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# (066) Accounting Firm New Application Checklist

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# General Information

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## Instructions:

1. To apply for licensure of a Public Accounting firm under the provisions of the Illinois Public Accounting Act, follow all steps as they are indicated below. Please complete the application in its entirety to avoid any unnecessary delays in the processing of your application.
2. If the firm is a business corporation, limited liability company, limited liability partnership or a professional service corporation, please ensure the firm's legal business name entered in the registration page of the application matches the legal business name as filed with the Illinois Secretary of State.
3. Accounting firm registration fees are \$120.00. Fees are not refundable.
4. The application which you submit is valid for three years from the date of receipt.

## Important Information:

1. A majority of the ownership of the firm, in terms of financial interests and voting rights of all partners, officers, shareholders, members, or managers belongs to persons currently licensed in some state, and the partners, officers, shareholders, members, or managers whose principal place of business is in Illinois and who practice public accounting in Illinois, as defined in Section 8 of the Illinois Public Accounting Act, hold a valid license issued by Illinois.
2. The accounting firm may have any of the following ownership structures:
  - Business Corporation (Foreign or Domestic)
  - Limited Liability Company (Foreign or Domestic)
  - Limited Liability Partnership or Limited Partnership (Foreign or Domestic)
  - Professional Services Corporation (Foreign or Domestic)
  - General Partnership
  - Sole Proprietor
3. **Sole Proprietors:** Only sole proprietorships in which others take part in the conduct of business (e.g. "and Company", "and Associates") are required to obtain an Illinois firm license.
4. **Assumed Names:** Please note that the Illinois Assumed Name Act requires sole proprietorships and general partnerships to register with their local county clerk's office if the firm name is different from the owner(s) full legal name(s). Corporations, LLCs, and LLPs may register an assumed name as part of their required business filings with the Illinois Secretary of State.

# Application Requirements: Business Corporation

Business Type	Requirements
<p><b>Business Corporation Online Application</b></p>	<ol style="list-style-type: none"> <li>1. Create a user name, password, and enter your primary email</li> <li>2. Enter your Corporation's <b>Business Name</b>. This name should be the same as it appears on the Articles of Incorporation as filed with the Illinois Secretary of State. Please be sure Business Name matches the name found on the Illinois Secretary of State's website by <a href="#">clicking here</a>.</li> <li>3. Public Address including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> <li>• Security Questions</li> </ul> </li> <li>4. Mailing Address (<b>if it is different than your public address</b>) including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> </ul> </li> <li>5. Tax Information including: <ul style="list-style-type: none"> <li>• Your federal tax identification number (FEIN)</li> </ul> </li> <li>6. If your business corporation is <b>domestic</b>, you will be required to provide information on your business incorporation including: <ul style="list-style-type: none"> <li>• The Date of Incorporation</li> <li>• A PDF copy of your articles of incorporation from the Illinois Secretary of State.</li> <li>• Information on how to request a copy of your Articles of Incorporation the Illinois Secretary of State can be found by <a href="#">clicking here</a></li> </ul> </li> <li>7. If your business corporation is <b>foreign</b>, you will be required to provide information on your business incorporation including: <ul style="list-style-type: none"> <li>• The date of incorporation as filed in your jurisdiction of incorporation</li> <li>• A PDF copy of your articles of incorporation from your jurisdiction of incorporation</li> <li>• The date in which you received authority to transact business in Illinois as authorized by the Illinois Secretary of State</li> <li>• A copy of the authority to transact business in Illinois as filed with the Illinois Secretary of State</li> <li>• Information on how to request a copy of your Articles of Incorporation the Illinois Secretary of State can be found by <a href="#">clicking here</a></li> <li>• Information on how to request a copy of your Authority to Transact Business the Illinois Secretary of State can be found by <a href="#">clicking here</a></li> </ul> </li> </ol>

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|  | <p>8. If you plan to operate under an Assumed Name (also commonly known as a Doing Business As (DBA) or Trade Name) you will be required to provide:</p> <ul style="list-style-type: none"><li>• The DBA name which you will be operating under</li><li>• A PDF copy of your Assumed Name Filing with the Illinois Secretary of State.</li><li>• Information on how to file an Assumed Name for a Corporation with the Illinois Secretary of State can be found by <a href="#">clicking here</a></li></ul> <p>9. If you have any shareholders, directors or officers that are not Illinois licensed CPAs, select “No” for question number 42.</p> <p>10. For question number 43, you must select all shareholders, directors or officers licensed in Illinois by searching “<b>PUBLIC ACCOUNTING</b>” and adding them to the grid.</p> <p>11. For question number 44, if you have any shareholders, directors or officers that are not licensed as certified public accountants in Illinois, add them to the “Not Licensed in Illinois” grid.</p> |
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# Application Requirements: Professional Service Corporation (PC)

Business Type	Requirements
<p><b>Professional Service Corporation Online Application</b></p>	<ol style="list-style-type: none"> <li>1. Create a user name, password, and enter your primary email</li> <li>2. Enter your Professional Service Corporation's <b>Business Name</b>. This name should be the same as it appears on the Articles of Incorporation as filed with the Illinois Secretary of State. Please be sure Business Name matches the name found on the Illinois Secretary of State's website by <a href="#">clicking here</a>.</li> <li>3. Public Address including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> <li>• Security Questions</li> </ul> </li> <li>4. Mailing Address (<b>if it is different than your public address</b>) including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> </ul> </li> <li>5. Tax Information including: <ul style="list-style-type: none"> <li>• Your federal tax identification number (FEIN)</li> </ul> </li> <li>6. If your professional service corporation is <b>domestic</b>, you will be required to provide information on your business incorporation including: <ul style="list-style-type: none"> <li>• The Date of Incorporation</li> <li>• A PDF copy of your articles of incorporation from the Illinois Secretary of State</li> <li>• Information on how to request a copy of your Articles of Incorporation the Illinois Secretary of State can be found by <a href="#">clicking here</a></li> </ul> </li> <li>7. If your professional service corporation is <b>foreign</b>, you will be required to provide information on your business incorporation including: <ul style="list-style-type: none"> <li>• The date of incorporation as filed in your jurisdiction of incorporation</li> <li>• A PDF copy of your articles of incorporation from your jurisdiction of incorporation</li> <li>• The date in which you received authority to transact business in Illinois as authorized by the Illinois Secretary of State</li> <li>• A copy of the authority to transact business in Illinois as filed with the Illinois Secretary of State</li> <li>• Information on how to request a copy of your Articles of Incorporation the Illinois Secretary of State can be found by <a href="#">clicking here</a></li> <li>• Information on how to request a copy of your Authority to Transact Business the Illinois Secretary of State can be found by <a href="#">clicking here</a></li> </ul> </li> </ol>

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|  | <p>8. If you plan to operate under an Assumed Name (also commonly known as a Doing Business As (DBA) or Trade Name) you will be required to provide:</p> <ul style="list-style-type: none"><li>• The DBA name which you will be operating under</li><li>• A PDF copy of your Assumed Name Filing with the Illinois Secretary of State.</li><li>• Information on how to file an Assumed Name for a Corporation with the Illinois Secretary of State can be found by <a href="#">clicking here</a></li></ul> <p>9. If you have any shareholders, directors or officers that are not Illinois licensed CPAs, select “No” for question number 42.</p> <p>10. For question number 43, you must select all shareholders, directors or officers licensed in Illinois by searching “<b>PUBLIC ACCOUNTING</b>” and adding them to the grid.</p> <p>11. For question number 44, if you have any shareholders, directors or officers that are not licensed as certified public accountants in Illinois, add them to the “Not Licensed in Illinois” grid.</p> |
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# Application Requirements: Limited Liability Company (LLC)

Business Type	Requirements
Limited Liability Company Online Application	<ol style="list-style-type: none"><li>1. Create a user name, password, and enter your primary email</li><li>2. Enter your Professional Service Corporation's <b>Business Name</b>. This name should be the same as it appears on the Articles of Organization as filed with the Illinois Secretary of State. Please be sure Business Name matches the name found on the Illinois Secretary of State's website by <a href="#">clicking here</a>.</li><li>3. Public Address including:<ul style="list-style-type: none"><li>• Street Address, City, State, Zip, County, Country</li><li>• Business Phone Number</li><li>• Security Questions</li></ul></li><li>4. Mailing Address (<b>if it is different than your public address</b>) including:<ul style="list-style-type: none"><li>• Street Address, City, State, Zip, County, Country</li><li>• Business Phone Number</li></ul></li><li>5. Tax Information including:<ul style="list-style-type: none"><li>• Your federal tax identification number (FEIN)</li></ul></li><li>6. If your limited liability company is <b>domestic</b>, you will be required to provide information on your business organization including:<ul style="list-style-type: none"><li>• The Date of formation</li><li>• A PDF copy of your articles of organization from the Illinois Secretary of State.</li><li>• Information on how to request a copy of your Articles of Organization from the Illinois Secretary of State can be found by <a href="#">clicking here</a></li></ul></li><li>7. If your limited liability company is <b>foreign</b>, you will be required to provide information on your business organization including:<ul style="list-style-type: none"><li>• The date of organization as filed in your jurisdiction of formation</li><li>• A PDF copy of your articles of organization from your jurisdiction of formation</li><li>• The date in which you received authority to transact business in Illinois as authorized by the Illinois Secretary of State</li><li>• A copy of the Application for Admission in Illinois as filed with the Illinois Secretary of State</li><li>• Information on how to request a copy of your Articles of Organization from the Illinois Secretary of State can be found by <a href="#">clicking here</a></li><li>• Information on how to request a copy of your Application for Admission from the Illinois Secretary of State can be found by <a href="#">clicking here</a></li></ul></li></ol>

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|  | <p>8. If you plan to operate under an Assumed Name (also commonly known as a Doing Business As (DBA) or Trade Name) you will be required to provide:</p> <ul style="list-style-type: none"><li>• The DBA name which you will be operating under</li><li>• A PDF copy of your Assumed Name Filing with the Illinois Secretary of State.</li><li>• Information on how to file an Assumed Name for a LLC with the Illinois Secretary of State can be found by <a href="#">clicking here</a></li></ul> <p>9. If you have any organizers, members or managers that are not Illinois licensed CPAs, select “No” for question number 42.</p> <p>10. For question number 43, you must select all organizers, members or managers licensed in Illinois by searching “<b>PUBLIC ACCOUNTING</b>” and adding them to the grid.</p> <p>11. For question number 44, if you have any organizers, members or managers that are not licensed as certified public accountants in Illinois, add them to the “Not Licensed in Illinois” grid.</p> |
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# Application Requirements: Limited Liability Partnership (LLP)

Business Type	Requirements
<p style="text-align: center;"><b>Limited Liability Partnership Online Application</b></p>	<ol style="list-style-type: none"> <li>1. Create a user name, password, and enter your primary email</li> <li>2. Enter your Limited Liability Partnership's <b>Business Name</b>. This name should be the same as it appears on the Statement of Qualification as filed with the Illinois Secretary of State. Please be sure Business Name matches the name found on the Illinois Secretary of State's website by <a href="#">clicking here</a>.</li> <li>3. Public Address including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> <li>• Security Questions</li> </ul> </li> <li>4. Mailing Address (<b>if it is different than your public address</b>) including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> </ul> </li> <li>5. Tax Information including: <ul style="list-style-type: none"> <li>• Your federal tax identification number (FEIN)</li> </ul> </li> <li>6. If your limited liability partnership is <b>domestic</b>, you will be required to provide information on your firm including: <ul style="list-style-type: none"> <li>• The Date of formation</li> <li>• A PDF copy of your Statement of Qualification from the Illinois Secretary of State.</li> <li>• Information on how to request a copy of your Statement of Qualification from the Illinois Secretary of State can be found by <a href="#">clicking here</a>.</li> </ul> </li> <li>7. If your limited liability partnership is <b>foreign</b>, you will be required to provide information on your firm including: <ul style="list-style-type: none"> <li>• The date the LLP was formed as filed in your jurisdiction of formation</li> <li>• A PDF copy of your Statement of Qualification from your jurisdiction of formation</li> <li>• The date in which you received authority to transact business in Illinois as authorized by the Illinois Secretary of State</li> <li>• A copy of the Statement of Foreign Qualification in Illinois as filed with the Illinois Secretary of State</li> <li>• Information on how to request a copy of your Statement of Qualification from the Illinois Secretary of State can be found by <a href="#">clicking here</a></li> <li>• Information on how to request a copy of your Statement of Foreign Qualification from the Illinois Secretary of State can be found by <a href="#">clicking here</a></li> </ul> </li> </ol>

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|  | <p>8. If you plan to operate under an Assumed Name (also commonly known as a Doing Business As (DBA) or Trade Name) you will be required to provide:</p> <ul style="list-style-type: none"><li>• The DBA name which you will be operating under</li><li>• A PDF copy of your Assumed Name Filing with the Illinois Secretary of State.</li><li>• Information on how to file an Assumed Name for a LLP with the Illinois Secretary of State can be found by <a href="#">clicking here</a></li></ul> <p>9. If you have partners that are not Illinois licensed CPAs, select “No” for question number 42.</p> <p>10. For question number 43, you must select all partners licensed in Illinois by searching “<b>PUBLIC ACCOUNTING</b>” and adding them to the grid.</p> <p>11. For question number 44, if you have any partners that are not licensed as certified public accountants in Illinois, add them to the “Not Licensed in Illinois” grid.</p> |
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# Application Requirements: General Partnership

Business Type	Requirements
<p><b>General Partnership Online Application</b></p>	<ol style="list-style-type: none"> <li>1. Create a <b>BUSINESS</b> user name, password, and enter your primary email</li> <li>2. Enter your General Partnership's <b>Business Name</b>.</li> <li>3. Public Address including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> <li>• Security Questions</li> </ul> </li> <li>4. Mailing Address (<b>if it is different than your public address</b>) including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> </ul> </li> <li>5. Tax Information including: <ul style="list-style-type: none"> <li>• Your federal tax identification number (FEIN)</li> </ul> </li> <li>6. The Illinois Assumed Name Act requires sole proprietorships and general partnerships to register with their local county clerk's office if the firm name is different from the owner(s) full legal name(s). If you plan to operate under an Assumed Name (also commonly known as a Doing Business As (DBA) or Trade Name) you will be required to provide: <ul style="list-style-type: none"> <li>• The DBA name which you will be operating under</li> <li>• The County where it is filed</li> <li>• A PDF copy of your Assumed Name Filing from the county where it is filed</li> </ul> </li> <li>7. If you have partners that are not Illinois licensed CPAs, select "No" on question number 42.</li> <li>8. For question number 43, you must select all partners licensed as CPAs in Illinois by searching "<b>PUBLIC ACCOUNTING</b>" and adding them to the grid.</li> <li>9. For question number 44, if you have any partners that are not licensed as certified public accountants in Illinois, add them to the "Not Licensed in Illinois" grid.</li> </ol>

# Application Requirements: Sole Proprietorship

Business Type	Requirements
<p style="text-align: center;"><b>Sole Proprietor Online Application</b></p>	<ol style="list-style-type: none"> <li>1. Create a <b>BUSINESS account</b> with a user name, password, and primary email</li> <li>2. Enter your <b>Business Name</b>. Only sole proprietorships in which others take part in the conduct of business (e.g. "and Company", "and Associates") are required to obtain an Illinois firm license. <ul style="list-style-type: none"> <li>• Enter your name with "and Company", "and Associates" in this field</li> </ul> </li> <li>3. Public Address including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> <li>• Security Questions</li> </ul> </li> <li>4. Mailing Address (<b>if it is different than your public address</b>) including: <ul style="list-style-type: none"> <li>• Street Address, City, State, Zip, County, Country</li> <li>• Business Phone Number</li> </ul> </li> <li>5. Tax Information including: <ul style="list-style-type: none"> <li>• Your Social Security Number</li> </ul> </li> <li>6. The Illinois Assumed Name Act requires sole proprietorships and general partnerships to register with their local county clerk's office if the firm name is different from the owner(s) full legal name(s). If you plan to operate under an Assumed Name (also commonly known as a Doing Business As (DBA) or Trade Name) you will be required to provide: <ul style="list-style-type: none"> <li>• The DBA name which you will be operating under</li> <li>• The County where it is filed</li> <li>• A PDF copy of your Assumed Name Filing from the county where it is filed</li> </ul> </li> <li>7. You must select your Illinois CPA license by searching "<b>PUBLIC ACCOUNTING</b>" and adding it to the grid.</li> </ol>

# Application Fees

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<i>Fees collected through the licensing process are NOT REFUNDABLE OR TRANSFERABLE</i>		
<b>Complete</b>	<b>License Type</b>	<b>Submitted:</b>
1.	(066) Accounting Firm ..... \$120.00	ONLINE PORTAL
<b><i>NOTES: All major credit and debit cards as well as ACH and eCheck are accepted</i></b>		