

Checklist of changes to consider making to professional/licensing designation when a CPA or Firm credential is suspended/revoked/relinquished. This may not be all-inclusive.

When signing name on anything, do not use “CPA” or any form thereof, on behalf of self or the firm.

Do not use “CPA” or any form thereof on:

business cards,
stationery,
envelope return address,
phone answering,
verbal communications with clients/potential clients, others,
signage,
invoices,
checks,
software (often can be over-ridden),
advertising (telephone books, yellow pages, online, website, brochures, church/school directories),
web sites,
social media of all sorts,
online presence of all sorts [do an Internet search by individual and firm names to determine what must be changed or to whom written requests for changes must be sent¹],
ownership – how title is held to real estate, vehicles, or personal property: don’t use “CPA” or any form thereof,
electronic devices: “signatures” on texts, emails, etc., and face/name page on electronic devices,
fax headers,
statutory agent designations,
names of LLCs, corporations, other entities,
ownership of trade names,
trade names,
bank/financial accounts name and ownership,
officer/director positions for boards (HOAs, charities, non-profits), LLCs, Corporations, or other entities,

-Take immediate action pertaining to items that can be controlled, understanding that some things take time.

¹ Internet sites for which the CPA or Firm has no account may still have information that must be changed (such as Intellius, Spokeo, Manta, Yellowpages.com, Whitepages.com, CitySearch, People Search, etc.). Usually these sites have contact information where written requests for changes can be sent.

-For things that you personally cannot change, keep documentation of directions to others to make changes.

-When in doubt, get legal advice or send written notice to licensing agency of the issue and how you propose to handle it, and get written confirmation of agreement, or disagreement.

-If any chance clients will be informed in a negative way of interim suspension, take the "offense" and send your own letter to clients.

-If you think of other items not on this list, please share with me, so I can add them.

Thank you.

Lisa Gervase
Gervase Law Firm, PLLC
lgervase@gervaselaw.com
(480) 515-4801

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