

## Guide for Public Practice Renewal

If you are a member and a company administrator (representing your firm and registered with CPA NB) for a public practice and/or a professional corporation, the screenshot below reflects the first page you would see after logging into the member portal.

If you are logging in for the first time, you will have to **reset your password** using the 'forgot password' option. Your username is your **CPA Member number** which is the same as the old member portal. On the other hand, if you have already logged in as a member, you can continue with your set username and password.

For non-member company administrators, the username would be the **email address** registered with CPA-NB and you will have to **reset your password** using the 'forgot password' option. If you are not sure about your company administrator, please contact us at [regulatory@cpanewbrunswick.ca](mailto:regulatory@cpanewbrunswick.ca)

The screenshot displays the member portal interface. At the top, there is a user profile section with a placeholder for a profile picture and a summary of membership details: **Type** Regular Member, **Status** Active, and **Paid through** 3/31/2023.

The main content area is titled **Time to Renew Your Membership**. It includes the following text: "The deadline to renew your membership, confirm your annual CPD compliance, submit your annual declarations, and pay your membership dues and other fees is March 31." and "Late Fees will be assessed on April 1." Below this is a progress bar with five steps: **10% Completed**, **Step 1: Confirm your annual CPD compliance**, **Step 2: Submit Member Renewal**, **Step 3: Pay My Fees**, and **Renewal Complete**. A red line labeled **1.** points to the right side of this section.

Below the progress bar, a purple banner states: **The deadline to submit the Firm Declaration is March 31, 2023.** There are two rows of information, each with a dropdown menu, a text field, and a **Submit Declaration** button. A red line labeled **2.** points to the first **Submit Declaration** button, and another red line labeled **3.** points to the second **Submit Declaration** button.

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1. Click on “Step 1: Confirm your annual CPD compliance” in this screenshot and follow the process to complete your member renewal. For more on completing your member renewal, please see **“Guidance for Membership Renewal.”**
2. Click on “Submit Declaration” in this screenshot to access the professional corporation renewal form. For more information on completing your professional corporation renewal, please see **“Guidance for Professional Corporation Renewal.”**
3. Click on “Submit Declaration” in this screenshot to access the public practice renewal form

### Public Practice Renewal Form

After completing “3” above, the public practice renewal form is displayed. Please see below. Answer the questions and follow the prompts to complete your public practice renewal.

At the end of the page, please click “submit.”

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**CPA New Brunswick Statement**

CPA NB is committed to protecting the privacy and confidentiality of the personal information of its registrants. CPA NB will comply with the requirements of the Personal Information Protection and Electronic Documents Act and the the Chartered Professional Accountants Act (the Act), and will use fair and reasonable practices to meet its obligations under the legislation.

By applying for renewal of firm registration, the applicant consents to the collection, use or disclosure of information as set out in CPA NB's privacy policy, legislative authorities and other governing documents. Should the applicant wish to withdraw consent for the use or disclosure of this information, they must advise CPA NB in writing and the applicant must note there may be consequences to continued registration to practice public accounting. In addition, if there is a requirement to disclose information in accordance with the Act, Regulation, Bylaws, Directives or Resolutions, withdrawal of consent for such disclosure will have no effect.

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**Current Information**

Primary Operating Name (if different than legal name)

David A. Williston CPA PC Inc.

If you are operating under different name, please contact the regulatory department at [regulatory@cpanewbrunswick.ca](mailto:regulatory@cpanewbrunswick.ca).

Organization Structure\*

Does the firm train candidates using the Experience Verification Program Route \*

Yes  No

Are you currently training candidates using the Pre-Approved Program Route? \*

Yes  No

Select your registration option \*

Renew

De-register

Are you anticipating firm changes in the next 12months?

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**Other Jurisdictions**

Is your firm permitted/licenced or registered to practice professional or public accounting pursuant to legislation in one or more jurisdictions in Canada? \*

Yes  No

# Guide for Public Practice Renewal

## Areas of Practice

Registration/Permit Type: N/A

List of Services:

Do you need to make changes to your areas of practice? \*

Yes  No

### Public Practices Stream

What level of permit/registration will you like to renew for your firm?\*

#### Audit Engagement

Performing an audit engagement and issuing an auditor's report in accordance with the Standards of Professional Practice published by CPA Canada, as amended from time to time, or an audit engagement or a report purporting to be performed or issued, as the case may be, in accordance with those standards.

#### Review Engagement

Performing a review engagement and issuing a review report in accordance with the Standards of Professional Practice published by CPA Canada, as amended from time to time, or a review engagement or a report purporting to be performed or issued as the case may be, in accordance with those standards.

#### Compilation Engagement

An engagement completed or purporting to be completed in accordance with the Standards of Professional Practice published by CPA Canada, for the compilation of financial information, as amended from time to time.

### Other Public Practice Streams

#### Financial Advisory/Consulting

Accounting, insofar as it involves analysis, advice and interpretation in an expert capacity, but excluding record keeping.

#### Taxation Services

Insofar as it involves advice and counselling in an expert capacity, but excluding mechanical processing of returns.

## Professional Liability Insurance

A PLI Entry exists for this current Fiscal Year. If changes are required please contact [membership@cpanewbrunswick.ca](mailto:membership@cpanewbrunswick.ca).

## Declaration

I hereby renew the registration of the public practice and make this application on behalf of the public practice firm.

I declare that all information given in this application is true and complete, and that:

- I am familiar with the provisions of the Chartered Professional Accountants Act, CPA New Brunswick Code of Professional Conduct and CPA New Brunswick By-laws, and
- As a registered firm, I will be governed by the provisions of the Chartered Professional Accountants Act, CPA New Brunswick Code of Professional Conduct and CPA New Brunswick By-laws.

I authorize CPA New Brunswick to obtain such information as may be required to determine the firm's eligibility for renewal with the Chartered Professional Accountants of New Brunswick.

I understand that CPA New Brunswick may request additional information from the firm and that I may be requested to attend a meeting if my renewal is being considered. I consent or shall be deemed to have consented to any notification, publication or release of information in accordance with the policies of CPA New Brunswick.

I make solemn declaration conscientiously believing it to be true and knowing that making false declaration is a professional misconduct under CPA New Brunswick Code of Professional Conduct.

I affirm and certify that all the information and answers to questions herein are complete, true and correct to the best of my knowledge and belief. \*

Date of Submission \*

2023-02-13



Please enter your full name \*

Cancel

Submit

Upon submission, the page below will be displayed.

The screenshot shows the CPA New Brunswick Member Portal. At the top, there is a navigation bar with the CPA logo and "New Brunswick" text. Below this is a "Member Portal" header. The main content area displays a confirmation message: "The declaration form has been completed." This message is highlighted with a red circle. Below the message, there is a table with columns for "Type" and "Status". The "Type" column contains "Public Practice" and the "Status" column contains "Active". At the bottom of the page, there is a navigation menu with links for "About", "Contacts", "CPD & Events", "Transactions", and "Public Practices".