

Iowa Society of CPAs Membership Application

You may apply for ISCPA membership by completing and submitting this application form or completing the form online at www.iacpa.org.



Personal Information

Name _____ Nickname _____
first middle initial last
(As you would like it to appear on your ISCPA certificate and on your ISCPA record.)

Maiden name (if applicable) _____ Gender Male Female Date of birth _____

Street address _____ PO box _____

City _____ State _____ ZIP+4 _____

Home phone # (_____) _____ Mobile phone # (_____) _____

Spouse _____

College/University _____ Year graduated _____ Degree _____

Advanced degrees/professional credentials (MBA, ABV, etc.) _____

If you are certified, please provide the following information from your original CPA certificate.

Original certificate number _____ Issued by the state of _____ Date issued _____

If you hold an Iowa reciprocal CPA certificate, provide certificate #: _____ Date issued _____

Are you a member of AICPA? Yes No If yes, AICPA member number _____

If not employed, please check one Full-time student Retired Other _____

Contact Information/Preferences

Preferred address for ISCPA mailings Office Home

Preferred address for CPE mailings Office Home

May we send you ISCPA e-mail messages? Yes No

Preferred e-mail address _____

Secondary e-mail address _____

Include my information in online ISCPA membership directory (member's only section of website) Yes No

Professional Information

Business/Firm _____

Street address _____ PO box _____

City _____ State _____ ZIP+4 _____

Mail-stop _____ Position/title _____

Business Web site _____

General office phone # (_____) _____ Direct phone # (_____) _____ ext. _____

Interests

This section will be used to help identify your areas of interest so we may provide you with information that is relevant. You may select up to **SEVEN** areas of interest below.

- | | | |
|---|--|---|
| <input type="checkbox"/> AG Agribusiness | <input type="checkbox"/> EB Employee benefit plans | <input type="checkbox"/> MN Manufacturing |
| <input type="checkbox"/> AU Auditing | <input type="checkbox"/> FP Financial planning | <input type="checkbox"/> MA Mergers/acquisitions |
| <input type="checkbox"/> AT Auto dealers | <input type="checkbox"/> GO Government | <input type="checkbox"/> NP Nonprofits/associations |
| <input type="checkbox"/> BA Banking | <input type="checkbox"/> HC Health care/hospitals | <input type="checkbox"/> PC PCAOB |
| <input type="checkbox"/> BI Bankruptcy/insolvency | <input type="checkbox"/> HR Human resources | <input type="checkbox"/> RE Real estate |
| <input type="checkbox"/> BD Broker/dealer | <input type="checkbox"/> IT Information technology | <input type="checkbox"/> SD School districts |
| <input type="checkbox"/> BU Budgeting & forecasting | <input type="checkbox"/> IN Insurance | <input type="checkbox"/> SB Small business |
| <input type="checkbox"/> BV Business valuation | <input type="checkbox"/> IB International business | <input type="checkbox"/> SP Strategic planning |
| <input type="checkbox"/> CF Career & family issues | <input type="checkbox"/> IC Inventory control | <input type="checkbox"/> TC Taxation – corporate |
| <input type="checkbox"/> CM Cash management | <input type="checkbox"/> IV Investments | <input type="checkbox"/> TA Taxation – estate & gift |
| <input type="checkbox"/> CL Colleges & universities | <input type="checkbox"/> LE Legal | <input type="checkbox"/> TE Taxation – exempt organizations |
| <input type="checkbox"/> CN Construction | <input type="checkbox"/> LT Litigation support | <input type="checkbox"/> TI Taxation – individual |
| <input type="checkbox"/> CS Consulting | <input type="checkbox"/> MG Management – general | <input type="checkbox"/> TN Taxation – international |
| <input type="checkbox"/> CO Controllershship | <input type="checkbox"/> MP Management of account- ing practice | <input type="checkbox"/> TS Taxation – sales & use |
| <input type="checkbox"/> DF Debt financing | | |

Membership Classes

Resident and Non-Resident Members: Individuals holding a valid certificate issued by the Iowa Accountancy Examining Board or a similar board of any state or territory of the United States or the District of Columbia.

- Class 1 – Any CPA employed in Iowa and holding original certificate more than 10 years
- Class 2 – Any CPA employed in Iowa and holding original certificate 6-10 years
- Class 3 – Any CPA employed in Iowa and holding original certificate 5 years or less
- Class 4 – Non-resident (employed outside Iowa)
- Class 5 – Not currently employed or a full-time student [member who is not employed full-time (defined as more than twenty hours per week) or individuals not currently in the workforce due to full-time pursuit of additional education.]
 - Retired (a member who has permanently retired from the workforce)

Associate Members:

- Class 7 – Non-CPA owner of a CPA firm or a non-CPA accounting educator (college)
 - Non-CPA holder of a credential issued by the AICPA including, but not limited to, a Chartered Global Management Accountant (CGMA) or an Accredited Business Valuation (ABV) professional

Affiliates:

- Class 8– Professional: a non-CPA affiliated with the accounting profession; or
 - Exam-qualified: a non-CPA who meets one of the following requirements
 1. Eligible to sit for the uniform CPA exam or other AICPA credentialing examination
 2. Successfully completed the exam, but not yet received a CPA certificate

Disciplinary & Criminal History

1. Please describe any professional licensure revocation and other professional disciplinary actions:

2. Please describe any conviction of a crime described in Iowa Code section 542.5(2):

IMPORTANT: Application to be a member of the ISCPA is subject to meeting the membership requirements of the ISCPA and Board of Director approval. There is no right to appeal a membership denial.

ⁱ Iowa Code section 542.5(2) lists the following criminal convictions: forgery, embezzlement, obtaining money under false pretenses, theft, extortion, conspiracy to defraud, or other similar offense, or of any crime involving moral character or honesty, in a court of competent jurisdiction in this state, or another state, territory, or a district of the United States, or in a foreign jurisdiction, may be denied a certificate by the board on the grounds of the conviction. For purposes of this subsection, "conviction" means a conviction for an indictable offense and includes a guilty plea, deferred judgment from the time of entry of the deferred judgment until the time the defendant is discharged by the court without entry of judgment, or other finding of guilt by a court of competent jurisdiction.

Payment Information

Total Amount Submitted \$ _____

(see back page for prorated dues schedule. Please note the amounts listed include the \$35 application fee.)

Payment Type Personal Company **Payment Method** Check (payable to ISCPA) MasterCard Visa

Card # _____ - _____ - _____ - _____ Exp. Date _____

Cardholder signature _____ Print name _____

Auto renew my membership

Auto renew is the best way to make sure you never miss out on accessing your ISCPA benefits. We will charge your card each year before your membership expires. You can opt out of this feature at any time.

Verification

To the best of my knowledge, the information contained herein is accurate and I agree to be governed by the bylaws of the Iowa Society of CPAs.

Return this form with payment to Iowa Society of CPAs (ISCPA)
1415 28th St, Ste 450
West Des Moines, IA 50266-1419
515-223-8161 • 800-659-6375 (in Iowa)

Your membership will be processed upon receipt of this application and your payment.
A confirmation notice and related items will be sent to you shortly afterwards.

Iowa Society of CPAs...Advancing the professional success of our members.

ISCPA Prorated Dues Schedule

The prorated dues schedule below includes a one-time \$35 application fee

What to expect when applying for membership in January-May:

Individuals should follow the Jan-May section of the chart below. This will pay your membership through April 30, 2024.

Your prorated share of dues must be returned with your completed application.

Please note: Contributions, gifts, or dues paid to ISCPA are not deductible as charitable contributions for income tax purposes. However, they may be deductible as ordinary and necessary business expenses subject to restrictions imposed as a result of association lobbying activities.

| Current Annual Dues | | | | | | Associate | Affiliate |
|---------------------|---------|---------|---------|---------|---------|-----------|-----------|
| | \$300 | \$280 | \$250 | \$205 | \$99 | \$290 | \$150 |
| Period | Class 1 | Class 2 | Class 3 | Class 4 | Class 5 | Class 7 | Class 8 |
| Jan-May | \$335 | \$315 | \$285 | \$240 | \$134 | \$325 | \$185 |
| June | \$310 | \$292 | \$264 | \$223 | \$126 | \$301 | \$173 |
| July | \$285 | \$268 | \$243 | \$206 | \$118 | \$277 | \$160 |
| Aug | \$260 | \$245 | \$223 | \$189 | \$109 | \$253 | \$148 |
| Sept | \$235 | \$222 | \$202 | \$172 | \$101 | \$228 | \$135 |
| Oct | \$210 | \$198 | \$181 | \$155 | \$93 | \$204 | \$123 |
| Nov | \$185 | \$175 | \$160 | \$138 | \$85 | \$180 | \$110 |
| Dec | \$160 | \$152 | \$139 | \$120 | \$76 | \$156 | \$98 |

For membership class information, see page 2.