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# GUIDE TO FIRM RENEWAL

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**CPA**

CHARTERED  
PROFESSIONAL  
ACCOUNTANTS  
SASKATCHEWAN

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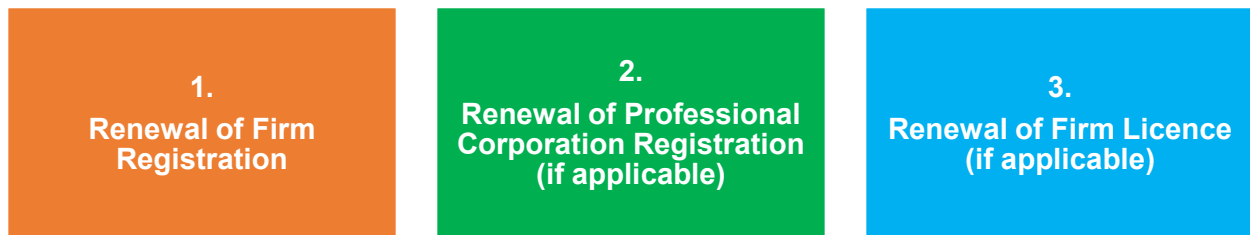
## WHY IS FIRM RENEWAL REQUIRED?

Firm registration with CPA Saskatchewan renews on a calendar year. Renewal is the mechanism by which CPA Saskatchewan receives information and declarations related to the firm's compliance with the Rules. It aids the execution of the legislated mandate that supports registrant's ongoing ability to practice in the reserved area (audits, reviews and compilations) or other regulated services (tax advisory, consulting, accounting services).

Annual firm renewal begins on November 1 of every year and is required under Regulatory Bylaw 10.4. Registered firms with CPA Saskatchewan renew on a calendar year basis.

**All firm permits and licences are effective from January 1 until December 31 of every year.**

Annually, firm renewal involves:



For clarity, **firm registration** and **firm licensure** are wholly separate means of firm regulation.

## WHAT INFORMATION DO I NEED TO KNOW?

<b>November 1, 2024</b>	Communication to designated firm contact and firm administrators, with firm professional corporation and firm licence renewal information.
<b>November 15, 2024</b>	First reminder.
<b>December 2, 2024</b>	Second reminder.
<b>December 20, 2024</b>	Final reminder.
<b>December 31, 2024</b>	Deadline to complete renewal and pay firm fees.



**Please ensure each of your licensed members has renewed their member licence through their member portal *PRIOR to completing your firm renewal*. Refunds for any incorrect categories within the firm roster will not be processed.**

# STEPS TO COMPLETE FIRM RENEWAL

[Log into your member portal here.](#)

It is recommended that you clear your internet browser's cache and history and use a private window or incognito mode during renewal.


Please DO NOT bookmark the renewal form in your internet browser.

To request the Authorization to Represent the Firm form for new individuals (i.e. if a staff person will be completing the renewal on the firm's behalf), please contact [registrar@cpask.ca](mailto:registrar@cpask.ca).

## 1. Sign in using your email address as the username, and password

Sign in

Keyword search



Home My Profile

To log into the **Member Portal**, the username is your preferred email address. If you require a new password, please click 'Forgot Password' below.

**CPA SK MEMBERS:** DO NOT create a new account. Please login below to access your Member Portal.

**CPA SK CANDIDATES:** DO NOT create a new account. You must contact CPA SK to set up your account.

Sign In

Username

Username

Required

Password

Password


Required


Sign In

[Forgot username?](#) | [Forgot password?](#)

[Create a new account](#)

## 2. Landing Page

Sign out  Hi, Joe Waterfront, CPA

 CHARTERED PROFESSIONAL ACCOUNTANTS SASKATCHEWAN

Home My Profile My CPD Events/Passports

### Welcome to the CPA Saskatchewan Portal!

Renew Your 2025 Licence and/or Professional Corporation (PC) Registration

Renewal of your licence and/or professional corporation is required by December 1, 2024.

**Renew Your Licence and/or Professional Corporation Registration**

Licence CPD Hours > Licence/PC Renewal Declaration > Professional Corporation Fees > Complete

### Complete Your 2025 Firm Registration Renewal

Renewal of your firm registration is required by December 31, 2024.

**JR Accounting Group - Regina**

Roster Declaration < Firm Renewal Declaration > Pay Fees > Complete

Complete your **Licence and/or Professional Corporation** renewal first (if applicable). See the **Guide to Member Licence and PC Renewal** for further instructions.

Once you have completed your Licence and/or Professional Corporation renewal (if applicable), click on **Roster Declaration** to begin the firm renewal.

## 3. Submit Roster Declaration

### Firm Roster

Instructions for the Firm Roster

1. Review current roster.
2. If changes are needed, select the appropriate tab - remove an employee or add an employee.
3. If you need to change the role for a member or if you have CPA Candidates to add to your roster, please email [registrar@cpask.ca](mailto:registrar@cpask.ca) before completing your declaration.
4. Click on #1 Current Roster to review your roster. Allow a few moments before your roster is updated in our database.
5. Once you have completed all the changes and confirmed the firm roster, click on "#4 Declaration" to submit.

1 Current Roster 2 Remove a CPA/CPA Candidate 3 Add a CPA 4 Declaration

**Current Roster as of November 1, 2024**

Full Name	Role
Joe Waterfront, CPA	CPA Licensed Member

Review your current firm roster to ensure accuracy. Email [licensing@cpask.ca](mailto:licensing@cpask.ca) if you need to adjust the role of any CPA Licensed Member. Email [registrar@cpask.ca](mailto:registrar@cpask.ca) if you need to adjust the role of any CPA Practice Leader or CPA Employee, or if you need to add a new CPA Candidate.

If you do not have any changes to make, click on #4 Declaration to finish this step.

Click on **Remove a CPA/CPA Candidate** if you need to remove a CPA or CPA Candidate from your roster. Click on **Add a CPA** if you need to add a CPA to your roster. You cannot add CPA Candidates to the roster.

## To remove a CPA or CPA Candidate:

1 Current Roster 2 Remove a CPA/CPA Candidate 3 Add a CPA 4 Declaration

**Remove CPA/CPA Candidate** Confirm Removal

Check the box to the left of the member's name to select the member(s) to be removed from your company roster. Once you have completed your selection, click Continue to confirm the removal. If you have selected the wrong member, click on "#1 Current Roster" to reset.

Find Reset

<input type="checkbox"/> Full Name	Role
<input checked="" type="checkbox"/> Manny Quinn	CPA Practice Leader
<input type="checkbox"/> Joe Waterfront	CPA Licensed Member

Check the box next to the individual's name that you wish to remove, then click **Continue**.

Continue

1 Current Roster 2 Remove a CPA/CPA Candidate 3 Add a CPA 4 Declaration

Remove CPA/CPA Candidate **Confirm Removal**

Full Name Manny Quinn \*Please confirm removal  
Role CPA Practice Leader Yes

\* Required Input

Select Yes in the dropdown for each individual you wish to remove, then click **Submit**.

Submit

## To add a CPA:

1 Current Roster 2 Remove a CPA/CPA Candidate 3 Add a CPA 4 Declaration

**Add a CPA** Assign Role

Using the find option below, find the member to add to the company roster. Once you have completed your selection, click Continue to confirm the addition.

Last Name Contains  
Russell

Find Reset

☐ Full Name

<input checked="" type="checkbox"/> Jane Russell
--

Type in the **last name** of the CPA you wish to add to the roster, then click **Find**.

Check the box next to the name of the CPA, then click **Continue**.

Continue

1 Current Roster 2 Remove a CPA/CPA Candidate 3 Add a CPA 4 Declaration

Add a CPA **Assign Role**

Using the dropdown menu, select the role for the new roster entry.

Full Name Jane Russell

\* Select Role  
CPA Employee

**Select the appropriate role for the CPA, then click **Submit**.**

CPA Licensed Member: CPAs that hold a Comprehensive, Specified or Compilation licence.

CPA Practice Leader: CPAs that are not licensed as above but are authorized to sign reports under “other regulated services” as defined in Bylaw 2.1(bb).

CPA Employee: CPAs that are neither licensed nor practice leaders as above.

**NOTE: All part-time CPA Employees/Practice Leaders/Licensed Members must be included on your firm roster, regardless of hours worked.**

Submit

### Roster Declaration:

1 Current Roster 2 Remove a CPA/CPA Candidate 3 Add a CPA 4 Declaration

Roster Declaration

\* I confirm that the firm roster declared here is correct and current.

Yes

**Select Yes in the dropdown, then click **Save**.**

Save Cancel

## 4. Submit Firm Renewal Declaration

### Complete Your 2025 Firm Registration Renewal

Renewal of your firm registration is required by December 31, 2024.

#### JR Accounting Group - Regina



Click on **Firm Renewal Declaration** to access the firm renewal form.

## 5. Privacy & Firm Demographics

### Firm Renewal

(please allow a few moments while the form opens)

Privacy & Firm Demographics 1	Assisting Professional Accountant 2	Licence 3	Professional Corporation 4	Areas Of Practice 5	Professional Liability Insurance 6	Declaration 7
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#### Privacy

CPA Saskatchewan is committed to protecting the privacy and confidentiality of personal information of its registrants. CPA Saskatchewan will comply with the requirements of the *Freedom of Information and Protection of Privacy Act* and the *Accounting Profession Act* (the Act), and will use fair and reasonable practices to meet its obligations under the legislation.

By applying for registration or licensure, or continuation of registration or licensure, the applicant consents to the collection, use or disclosure of information as set out in CPA Saskatchewan'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 Saskatchewan in writing and the applicant must note there may be consequences to continued registration or approval. 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.

☐ I confirm I have read the above privacy policy. \*

☐ I confirm I have read all instructions and understand what is required from me upon renewal. \*

#### Firm Demographics

☒ Please ensure all information recorded here is correct and current.

CPA SK ID

8060387

Status

Active

Category

Primary Licensed

Practice Commenced

2021-10-01

Firm Legal Name (as registered)

JR Accounting Group

Firm Primary Operating Name (if different than legal name)

JR Tax

If you are operating under a different name, please contact the Registrar at [registrar@cpask.ca](mailto:registrar@cpask.ca).

Address Line 1

123 Main Street

Address Line 2

City

Regina

Province

Saskatchewan

Postal Code

S4W 0G3

Firm Organization Structure

Sole Practitioner

Services Offered in Additional Languages (if not present in the dropdown, email [registrar@cpask.ca](mailto:registrar@cpask.ca) to add)

Names of Bilingual Members

Hannah

Cancel

Next

© CPA Saskatchewan

If the **Practice Commenced** date is empty or if the date appears incorrect, email [registrar@cpask.ca](mailto:registrar@cpask.ca) to confirm.

Firms cannot change their **legal name** or their **operating name**. To change these names, email [registrar@cpask.ca](mailto:registrar@cpask.ca) and provide additional documents as necessary.

If your firm structure has changed, email [registrar@cpask.ca](mailto:registrar@cpask.ca) to confirm.

If the firm offers **services in another language**, select them here. If the language isn't on the dropdown, email [registrar@cpask.ca](mailto:registrar@cpask.ca) to have it added.

## 6. Assisting Professional Accountant (if applicable)

### Assisting Professional Accountant

Under Board Rule 314.14, all sole practitioners are required to appoint an assisting professional accountant to assist with client succession in the event of the appointing sole practitioner's death or incapacity and name that member to CPA Saskatchewan.

Named Assistant \*

Jane

**All Sole Practitioners must have an Assisting Professional Accountant.**

## 7. Licence (if applicable)

### Licence

☒ Please ensure all information recorded here is correct and current.

Your firm's current licence information is displayed below. Please ensure each of your licensed members have renewed their member licence through their member login.

Please contact our licensing department at [licensing@cpask.ca](mailto:licensing@cpask.ca) or 306-359-0272 if you intend to change your licence type. Further information on how to proceed with your licence renewal application will be given at that time.

Licence Number

8060387-2024

Licence Type

Compilation

Expiry Date

2024-12-31

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

☒ Yes ☐ No

What is the jurisdiction of the other licence? \*

Expiry date of licence in other jurisdiction \*

yyyy-MM-dd

What services does the licence cover? \*

Please list any restrictions of the licence:

If the firm is licensed in another jurisdiction in Canada, enter the information of the **other licence** here. Please send any changes regarding licence type to [licensing@cpask.ca](mailto:licensing@cpask.ca).



## 8. Professional Corporation (if applicable)

### Professional Corporation

✓ Please ensure all information recorded here is correct and current.

We have detected the following Professional Corporation on your record. The following is required:

1. If there have been any changes in the last calendar year to the director and shareholders of the corporation, please email [registrar@cpask.ca](mailto:registrar@cpask.ca). You are not required to submit your ISC report annually if there are no changes.
2. Complete the declaration below.
3. Pay your renewal fees online.

Name	Directors	Permit Expiry
Joe CPA PC LTD		2024-12-31

☐ I declare that all the information in this renewal is true and complete and that: \*

- I make this renewal on behalf of the Professional Corporation, and
- The Professional Corporation complies with the provisions of *The Professional Corporations Act*, and
- I agree that as a Professional Corporation, the Professional Corporation will be governed by the Rules enacted, and to be made and enacted, by the Institute of Chartered Professional Accountants of Saskatchewan, and
- I declare that, in the last calendar year, there have been no changes to the Directors or Shareholders to the Professional Corporation OR the changes have been submitted to the Registrar.

If the professional corporation is **no longer being used**, it must be **closed**. CPA Saskatchewan requires the **Certificate of Amendment or Dissolution** confirming that the professional corporation is no longer active and that the name has been changed. Please email this to [registrar@cpask.ca](mailto:registrar@cpask.ca).

Select the **checkbox** to finish this declaration.

## 9. Areas of Practice

### Areas of Practice

✓ Please ensure all information recorded here is correct and current.

Select each service offered by the firm below. This information will be displayed online under the Find a CPA Firm feature [here](#). \*

#### Practice of Professional Accounting (A licence is required to perform these services)

- ☐ Audit Engagements ?
- ☐ Review Engagements ?
- ☒ Compilation Engagements ?
- ☐ Other Assurance Engagements

#### Other Regulated Services (A licence is not required to perform these services)

- ☒ Accounting Services ?
- ☐ Bankruptcy and Insolvency Trusteeship or Administration
- ☐ Engagement Quality Reviews
- ☐ Finance Services, including Financial Planning ?
- ☐ Forensic Accounting
- ☐ Management Accounting/Management Consulting ?
- ☐ Taxation Services ?

Check the appropriate **areas of practice** of the firm. This information will be displayed on the CPA Saskatchewan website.

Click on the ? for a description of each service.

## 10. Professional Liability Insurance

### Professional Liability Insurance

☒ Please ensure all information recorded here is correct and current.

Do you have an active Professional Liability Insurance (PLI) policy or have you renewed your PLI policy in 2024? \*

☒ Yes ☐ No

Confirm the PLI policy details are correct and current. There is no need to send a copy of the insurance certificate to CPA Saskatchewan.

### Insurance Policy Details

Provider \*

CPA Professional Liability Plan

Policy Number \*

123456

Amount of Coverage \*

\$ 2000000 .00

Effective Date \*

2024-08-01

Expiry Date \*

2025-08-01

Enter the coverage limit per occurrence \*

\$ 2000000 .00

Enter the coverage limit in aggregate \*

\$ 2000000 .00

Are defense costs separate from the minimum requirements? \*

☒ Yes ☐ No

If the policy has lapsed or the firm does not have the appropriate coverage, complete the **lapse declaration form** which will be made available on the renewal form when applicable and email to [registrar@cpask.ca](mailto:registrar@cpask.ca).

### PLI Declaration

We'll declare that all information is accurate and current and that this professional liability insurance provides coverage in compliance with The Accounting Profession Act and the Rules of the Institute of Chartered Professional Accountants of Saskatchewan.

Declaration Date

2024-10-22

## 11. Declaration

### Declaration

☒ I hereby renew the registration and licensure, if applicable, as a firm and make this application on behalf of the firm as provided for under Regulatory Bylaw 10.4. \*

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

- I am familiar with the provisions of the Rules of the Institute of Chartered Professional Accountants of Saskatchewan as defined in Bylaw 2.1(nn), and
- As a registered and licensed firm, as applicable, I will be governed by the said Rules enacted and to be made and enacted by the Institute of Chartered Professional Accountants of Saskatchewan, and
- On approval of this application, I will maintain custody of the firm permit of the Institute of Chartered Professional Accountants of Saskatchewan in the event of a change of ownership.

Click all checkboxes and type the name of the **Designated Contact** or the **Authorized Representative** of the firm.

Click on **Submit** to proceed to payment.

☒ I authorize the Institute to obtain such information concerning education and experience of the firm as may be required by the Institute of Chartered Professional Accountants of Saskatchewan. \*

☒ I understand that the Registration Committee or Professional Practice Committee may meet if my renewal is being considered by the committee. I consent to the meeting in accordance with the Rules. \*

☒ I make solemn declaration conscientiously believing it to be true and knowing that making false declaration is professional misconduct under The Accounting Profession Act. \*

Type your name below to indicate your concurrence with all of the above: \*

Joe Waterfront

Declaration Date \*

2024-10-22

Cancel

Previous

Submit

## 12. Pay Firm Fees

### Review Items

Term dates 1/1/2025 to 12/31/2025

Item	Unit Price	Quantity	Amount
<input checked="" type="checkbox"/> CPA Firm Fee	275.00	1	275.00
<input checked="" type="checkbox"/> CPA Firm Fee GST	13.75	1	13.75

Item	Unit Price	Quantity	Amount
<input checked="" type="checkbox"/> Professional Corporation Fees	75.00	1	75.00
<input checked="" type="checkbox"/> Professional Corporation Fees GST	3.75	1	3.75

Click on **Confirm Fees** to proceed to the cart.

Subtotal 367.50

[Confirm Fees](#)

Type of Renewal Fee	Amount of Fee	GST	TOTAL
Primary Firm Registration Renewal per CPA Licensed Member	\$275.00	\$13.75	\$288.75
Primary Firm Registration Renewal per CPA Practice Leader	\$250.00	\$12.50	\$262.50
Primary Firm Registration Renewal per CPA Employee	\$175.00	\$8.75	\$183.75
Primary Firm Registration Renewal per CPA Candidate	\$150.00	\$7.50	\$157.50
Affiliate Firm Registration Renewal (Flat Fee)	\$300.00	\$15.00	\$315.00
Professional Corporation Renewal Fee	\$75.00	\$3.75	\$78.75



**IMPORTANT:** If you will be paying at a later date, or by cheque or EFT, or to obtain an itemized invoice, you must select **Confirm Fees**, then **Generate Invoice/Pay by cheque or EFT**, then **Submit Order**. You do not need to enter anything in the PO number field. Click on **Home** on the top menu, then the **Pay Fees** button. Your invoice will be ready under **Invoices/Receipts** to view or pay.

#### To Pay Now:

##### Payment Details

☒ Pay Now ☐ Generate Invoice/Pay by cheque or EFT

Payment amount  
288.75

Payment method

Visa

\*Name on card

\*Card

Card number

MM/YY

CSC

Postal code

#### To Pay by Cheque/EFT or Obtain Invoice:

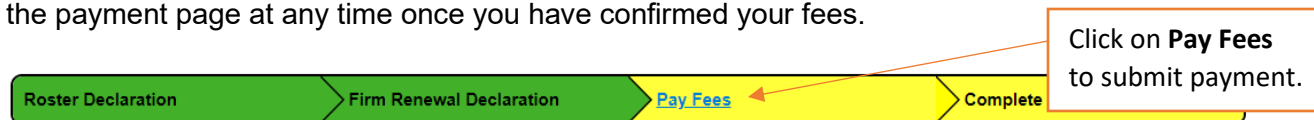
##### Payment Details

☐ Pay Now ☒ Generate Invoice/Pay by cheque or EFT

PO number

[Submit Order](#)

Firms interested in paying by EFT must contact [accounting](#) prior to sending the EFT. You may click on **Pay Fees** on the Progress Tracker or the **cart icon** at the top of the screen to access the payment page at any time once you have confirmed your fees.



Click on **Pay Fees** to submit payment.

Firm renewal is considered complete when all required steps of the renewal are completed, all forms are submitted (as applicable) and payment is received.

### 13. Obtain Applicable Firm Licence/Permits Online

The screenshot shows the CPA Saskatchewan Member Portal. At the top, there is a blue header with 'Sign out', a shopping cart icon, 'Hi, Joe Waterfront, CPA', and a 'Keyword search' box. Below the header is the CPA logo and navigation links: 'Home', 'My Profile', 'My CPD', and 'Events/Passports'. A secondary navigation bar contains tabs: 'Welcome', 'Profile', 'CPA SK Events', 'Invoices/Receipts', 'CPA SK Communications', and 'CPA SK Communications'. Below this is another set of tabs: 'Change Password', 'Licence', 'Professional Corporation', and 'Manage Your Firm'. An arrow points from a text box to the 'Manage Your Firm' tab.

Welcome to the CPA Saskatchewan Member Portal

Select the tab you need.

Under **My Profile**, click on **Manage Your Firm** and then your **firm name**. The appropriate permit(s) will be under **Permits for Download**. Please allow 1-2 days after completing payment for the permits to appear.

All information submitted to CPA Saskatchewan in support of the firm renewal is subject to verification or request to provide additional information at the time of renewal.

#### Need assistance?

Contact [licensing@cpask.ca](mailto:licensing@cpask.ca) for licensing specific questions.

Contact [registrar@cpask.ca](mailto:registrar@cpask.ca) or call (306) 359-0272 for general renewal questions.