MONTANA ACCOUNTANT ROUTES / 01

FOLLOW THE MONTANA ROUTES

Record official paths and dates only; keep names, license details, results and complaint facts private.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Proposal A / accounting objective / no financial figures

Provider A / public-name reference kept privately

Montana Board of Public Accountants hub / date checked

Licensee Lookup Route A / date checked / no result

DLI Complaint Information Route A / date checked / no facts

Uncertain identity, status or source question / office to ask

Preparation only. Not accounting, tax, audit, legal, licensing, credential, complaint, public-record or provider-selection advice. No identity, status, qualification or hiring conclusion. Keep names, numbers, results and private records out.

MONTANA ACCOUNTANT ROUTES / 02

SEPARATE PROPOSAL AND SOURCE NOTES

Keep provider statements, official routes and unresolved questions as separate references.

Person expected to perform work / proposal section

Business or provider label / proposal role

Supervisor or review role / proposal section

Official-route observation / private source label / no interpretation

Provider clarification / date / written follow-up requested

Unresolved role, identity, status or responsibility question

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MONTANA ACCOUNTANT ROUTES / 03

CHECK THE ROUTE PACKET

Tick what is organized. These checks do not confirm a license, record, complaint or service quality.

- [ ] Every person and business uses a neutral label
- [ ] Each official route has a date consulted
- [ ] Actual names, numbers and results remain private
- [ ] Provider statements are separate from official-page notes
- [ ] Board, lookup and complaint routes are separated
- [ ] Uncertain labels remain questions for the proper source
- [ ] Financial, tax and complaint details are excluded
- [ ] No source note is treated as endorsement or wrongdoing

License-lookup or board question still open

Provider scope or deliverable clarification still requested

Complaint-route question kept separate from facts and evidence

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MONTANA ACCOUNTANT ROUTES / 04

QUESTIONS FOR THE ACCOUNTING PROVIDER

Ask every provider the same role and scope questions; send official-record uncertainty to Montana DLI.

Identity: which public name and proposal role should I use?

Route: which official Montana page should I consult?

Performance: who will perform or supervise each service?

Records: what is needed, how is it transferred and who retains it?

Clarification: who can address an uncertain official-source question?

Scope: where are deliverables, exclusions, timing, fees and follow-up written?

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MONTANA ACCOUNTANT ROUTES / 05

COMPARE ROLE AND ROUTE CLARITY

Use Provider A and Provider B with the same non-sensitive brief. Official routes do not decide fit.

Provider A / Provider B / proposed-person labels / dates

Proposal roles, official routes, source dates and explanations - A / B

Accounting scope, records, deliverables and follow-up - A / B

Exclusions, timing, complete fees and unresolved questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a CPA & Accounting request. Share a non-sensitive provider-role, scope and record-handoff brief so participating pros can compete with proposals. Compare who will perform the work, written scope, deliverables, exclusions, records, timing, fees and fit. Keep identities, lookup results, financial information and complaint material out of the public request.

One request. Every pro's best offer.

Start a request

Participation varies. A planning conversation may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/accounting

Montana Board of Public Accountants (official reference)

Montana DLI: Lookup Licensed Individual (official reference)

Montana DLI: How to File a Complaint (official reference)

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