NJ ACCOUNTANT RECORDS / 01

LOG THE OFFICIAL SEARCH ROUTES

Keep actual names and record details in your private source file. This page records routes and questions, not conclusions.

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

Proposal A / general engagement purpose / no client or provider names

Person A / role shown in private proposal / private source reference

Person Search / exact official page / date checked / Public Record A

Firm A / business role shown in private proposal / private source reference

Business Search / exact official page / date checked / Public Record B

Uncertain route, identity or status wording / board question / owner

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

NJ ACCOUNTANT RECORDS / 02

ALIGN ROLES AND RESPONSIBILITIES

Separate proposal language, public-record observations and provider explanations before comparing engagement scope.

Person A / stated role / work responsibilities / proposal section

Firm A / stated role / engagement responsibilities / proposal section

Preparation, review and approval handoffs / owner for each

Client communication and secure record-request handoffs / owner

Public-record observation / exact route and date / no interpretation

Provider explanation / written clarification promised / unresolved question

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

NJ ACCOUNTANT RECORDS / 03

CHECK THE REFERENCE PACKET

Tick what is organized. These checks do not confirm identity, credentials, standing or engagement suitability.

- [ ] Proposal, person, firm and public records use neutral labels
- [ ] Actual names and record details remain in a private source file
- [ ] Person Search and Business Search are kept separate
- [ ] Every official-page note includes a route and date
- [ ] Proposal wording is separate from record observations
- [ ] Provider explanations are recorded as explanations, not findings
- [ ] Work roles and responsibility handoffs are tied to proposal sections
- [ ] No credential, status or hiring conclusion is recorded

Person-search question still open / board or qualified reviewer

Business-search question still open / board or qualified reviewer

Role or responsibility clarification requested / proposal section

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

NJ ACCOUNTANT RECORDS / 04

QUESTIONS FOR THE ACCOUNTING PROVIDER

Ask every provider the same role and responsibility questions. Send official-record questions to the board or another qualified source.

Names: which private person and firm references match your proposal?

Routes: which person or business search route applies to each label?

Roles: who prepares, reviews, approves and communicates each output?

Records: who should clarify an uncertain match or status phrase?

Security: how will private records be requested and exchanged after engagement?

Update: what written proposal or responsibility summary will change?

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

NJ ACCOUNTANT RECORDS / 05

COMPARE ROLE AND RECORD CLARITY

Use Providers A and B with the same non-sensitive brief. A public-record reference is not a provider endorsement.

Provider A / B / proposal versions / discussion dates

Person and firm labels, official routes and dated references - A / B

Preparation, review, approval, communication and delivery roles - A / B

Written clarifications, secure handoffs 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 role, responsibility and deliverable brief so participating pros can compete with proposals. Compare written scope, responsibilities, communication, timing and fit. Keep private financial and public-record details out of the request.

One request. Every pro's best offer.

Start a request

Participation varies. A private role, engagement and secure-record discussion may be needed before a final proposal.

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

New Jersey State Board of Accountancy (official reference)

New Jersey Division of Consumer Affairs: License Verification (official reference)

New Jersey MyLicense Verification (official reference)

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