

1. I am thinking about incorporating or forming a limited liability company for my practice. How do I proceed?

1. Contact the Oklahoma Secretary of State about forming a professional services firm. The phone number is 405-522-4560.
2. Contact the Oklahoma Accountancy Board for a letter of good standing which certifies that each of the incorporators, directors, members, partners and shareholders are registered and hold a permit to practice public accounting. This certification is required by the Secretary of State.
3. File a completed initial firm registration form with the Board as soon as the Secretary of State has issued your corporate charter. The Board requires a copy of the charter and a copy of the Articles of Incorporation as filed with the Oklahoma Secretary of State, with all amendments thereto to be filed with the initial firm registration.

2. If my firm is not located in Oklahoma, do I still have to register my firm?

It depends, if you or any certified/licensed member of your staff physically come into the State of Oklahoma to serve Oklahoma clients on behalf of the firm, the firm must be registered.

3. What about partnerships? How are those registered?

For a General Partnership, you need only complete the CPA or PA Partnership Initial Registration Form and remit applicable fees.

4. What about a Limited Liability Partnership?

In addition to completing the CPA or PA Partnership Initial Registration form, you will need to register the firm with the Oklahoma Secretary of State as instructed in Question 1.

5. If my firm is already registered, how do I register additional offices in Oklahoma?

If these offices are located in Oklahoma, you will need to submit a letter to the Board with the office address, phone number and designated manager.

6. What if I need to change the name or structure of my firm?

1. If applicable to the type of entity, contact the Oklahoma Secretary of State about renaming a professional services firm. The phone number is 405-522-4560.
2. File a complete initial firm registration form with the Board as soon as the Secretary of State has issued your amended corporate charter. The Board requires a copy of the charter and a copy of the amended Articles of Incorporation as filed with the Oklahoma Secretary of State with all amendments thereto to be filed with the Initial firm registration.
3. If you need to dissolve the previous firm, you can either file a notice of dissolution form or attach a letter requesting the firm be dissolved.

ATTENTION ALL FIRMS!

Did you know?

Section 15.15A.C. of the Oklahoma Accountancy Act requires the following to be reported by letter to the Board within 30 calendar days from the date of occurrence:

1. Changes in the shareholders, members, or partners of the firm;
2. Changes in the structure of the firm;
3. Changes in the designated manager of the firm;
4. Changes in the number or location of offices of the firm;
5. Denial, revocation, or suspension of certificates, licenses, permits, or their equivalents to the firm or its shareholders, members, partners, or employees other than in this state.