



2021 - 2022 REFERRAL SERVICE

A benefit offered at no cost to TXCPA Houston members **refers new clients to your firm!** Members of the public frequently contact the Society to ask where they can find CPA services. TXCPA Houston will screen all inquiries, match them with member firms registered in the 2021 - 2022 Referral Service, and forward their contact information to appropriate members.

What is the cost? The Referral Service is included with TXCPA Houston membership.

Do I need to register each year? Yes. Inaccurate information is a sure way to sever connections to potential new clients. Participants must register each year starting on June 1.

How do I register? Complete the attached form and return it with any requested documents to **Carol Spencer** at cspencer@txcpahouston.cpa . Check all areas of expertise offered by your firm that you want included in the Referral Service database.



2021 - 2022 REFERRAL SERVICE - REGISTRATION FORM

Please enroll the CPA practice unit designated below. **This form must be submitted for renewals as well as new members.**

PLEASE PRINT

Firm Name

Contact Name

Firm Address

Phone Number

City, State, Zip

Fax Number

e-mail

New Members:

A copy of my firm's current Texas License is enclosed.

Renewals:

I have no action pending which would jeopardize my license in the future.

Please select any of the following areas of competence:

ACCOUNTING

- A/R-Billing
- Audit
- Compilation
- General Ledger/Bookkeeping
- Payroll
- Review

MANAGEMENT ADVISORY SERVICES

- Computer Systems Analysis/Software
- Forecasts & Projections
- Forensic Accounting
- Mergers/Acquisitions
- Small Business Startup

INDUSTRY COMPETENCE

- Agriculture, Farming & Ranching
- Construction & Real Estate
- Financial Institutions
- Food Service & Restaurants
- Government
- Health Care
- Insurance & Employee Benefits
- Manufacturing
- Nonprofit Organization
- Oil & Gas
- Professional Services
- Retail & Wholesale Outlets
- Sales & Services
- Transportation

TAX

- Bankruptcy
- Divorce Planning
- Estate & Trust Taxation
- Estate Planning
- International
- IRS Practice & Procedure
- Retirement Analysis
- Sales & Franchise Tax
- Tax Preparation - Corporate
- Tax Preparation - Expatriate/Displaced Alien
- Tax Preparation - Individual
- Tax Preparation - Partnership
- Tax Shelters

OTHER

- Business Valuation
- Cryptocurrency
- ElderCare Services
- Personal Financial Planning
- SBA Loan Packages

OTHER – list additional services you want to include

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www.TXCPAhouston.cpa



This practice unit has staff who can speak with clients in the following language(s):

Please list all owners of the registering firm's office:

The undersigned firm representative, on behalf of the firm, hereby:

1. Certifies that the firm is competent to handle matters which have been designate above.
2. Acknowledges that the Referral Service is operated solely as a public service and TXCPA Houston (www.TXCPAhouston.cpa) is not responsible for actions of prospective clients.
3. Waives any claim against TXCPA Houston and holds it harmless from and against any loss, claims, suits or liability arising directly or indirectly from referral of prospective clients to the firm.

Signature of TXCPA Houston member and authorized firm representative

Please print name

Date



Referral Service

Joining the Referral Service

1. TXCPA Houston, a Chapter of Texas Society of Certified Public Accountants, will conduct all mailing to the membership through practice units (i.e., by each physical location in the case of multi-office CPA firms). Practice units will be invited to subscribe to the Referral Service.
2. Basic requirements for practice units subscribing to the Referral Service are:
 - a) The practice unit must be licensed by the State of Texas to practice public accounting as an individual practitioner, a partnership, or a professional corporation. A current copy of the firm's registration with the Texas State Board of Public Accountancy must accompany the Referral Service registration form.
 - b) The practice unit must agree to a waiver of confidentiality to permit the CPA Society to determine from the Texas State Board of Public Accountancy and the Texas Society of CPAs that the practice unit has current active license to practice.
 - c) The practice unit is obligated to an interview of up to one-half hour at no charge, if requested by the referred party. Any charges during the initial meeting with the referred party should be stated up front.
 - d) The practice unit is not required to accept an engagement from the referred party.
 - e) All partners or shareholders (if a professional corporation) must hold membership in TXCPA Houston.
 - f) The practice unit must be engaged in the practice of public accounting on a full-time basis.
 - g) All members must maintain a professional appearance.
3. Each practice unit may designate the types of services which it provides on the registration form.
4. Each practice unit will designate at least one person in the firm to be the primary contact for referred parties.

Master File of Participating Practice Units

1. A master file of all practice units who register with the Referral Service will be established.
2. Each practice unit will have on file the following information:
 - a) firm name
 - b) firm address
 - c) firm phone number
 - d) name of at least one designated contact for referrals
 - e) firm email address of the contact person for referrals
 - f) type of services the practice unit is willing to provide
3. Upon receipt of the registration form each practice unit's name will be placed in the master file.