

## RETIRED STATUS REQUEST INSTRUCTIONS

### Requirements:

- 55 years of age or older;
- an Active or Inactive licensee in good standing (**IMPORTANT!** See section in green below\*) or hold exempt status; and
- retired in all jurisdictions from the practice of public accounting.

See [MN Statute 326A.045](#).

**Effective Date:** Your status change becomes effective **the day the Board approves your request**. As of that date, **you must not perform any work that requires an Active CPA license or otherwise hold out as a CPA**, other than using the title “CPA Retired” or “Retired CPA.” **You must comply with the terms of the retired affidavit (see form)**. Retired status requires no renewal.

**Fee:** Retired status has no fee **when requested prior to the expiration** (December 31) of your existing license (if currently Active or Inactive).

**If your license has expired since the most recent renewal period** (for example: expired 12/31/2021 and it is now 2022), **you must submit the \$50 late filing fee** by check or money order (payable to **Board of Accountancy**), along with this request form.

**\*If your license has expired and you missed more than one December 31 renewal deadline** (for example: expired 12/31/2019 or 12/31/2020 and it is now 2022), **you must first get your license back in good standing by completing the prior renewal(s) before requesting retired status**.

Note that practicing or holding out as a Minnesota CPA without a license may be grounds for enforcement action ([MN Statute 326A.10](#)).

### How to Submit Your Retired Status Request:

**If no late filing fee is required**, you may mail (see address above) or email this form. Email [boa@state.mn.us](mailto:boa@state.mn.us). Put “Retired Status Request” and your Minnesota license number in the subject line.

**If you are required to submit the late filing fee**, you must send it and this form **together by mail** (see address above and “Fee” information). **Fees and forms not submitted together will be returned**.

**Verifying Your Status:** You will receive mailed notice from the Board of the change to retired status and can also consult the “Find a CPA” lookup on the Board’s website: [boa.state.mn.us/findCPA.html](http://boa.state.mn.us/findCPA.html). You can check your existing license status and expiration date there as well, prior to submitting this change request.

Your retired status request will be processed as soon as possible, but do allow up to 10 business days from the date the Board would have received your form before expecting the update to be posted to the website.

**Firm Owners:** You cannot be an owner of a Minnesota CPA firm if you do not hold an active license. Sole proprietors must notify the Board in writing of the dissolution of the sole proprietorship; CPA firms must notify the Board (see [MN Rules 1105.4100](#)) of the ownership change.

### NOTICE OF COLLECTION OF PRIVATE DATA

In accordance with the Minnesota Government Data Practices Act (MN Statute §13.04, Subd. 2), the Board is required to inform you of your rights as they pertain to private data collected from you on this application for renewal. The data you furnish on the application will be used by the Board to assess your qualifications for renewal. Pursuant to Minnesota Statutes §270C.72, subdivision 4 (2020) the Board must provide the Commissioner of the Minnesota Department of Revenue a list of all applicants, including name, address and social security number or Individual Tax Identification Number (ITIN), each calendar year for the purpose of identifying individuals owing delinquent taxes. Pursuant to Minnesota Statutes §13.41, subdivision 2 (2020), all application data, except name and designated address, are private data until licensure is granted. When licensure is granted, all data, except social security number and non-designated address, become public record.

The Board will not share your private data with other persons or agencies unless you authorize its release or it is required by law or court order.

## RETIRED STATUS REQUEST FORM

Please review the instructions before completing.

### 1. PERSONAL INFORMATION

If not currently employed, leave work information blank.

If employed, what is your preferred “mail to” address?  Home  Business

Legal Name \_\_\_\_\_  
(First) (Middle) (Last) (Suffix)

Certificate # \_\_\_\_\_ Employer Name \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Home Address \_\_\_\_\_ Work Address \_\_\_\_\_  
(Provide street address) (Provide street address)

City \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

2. **Since your last renewal, have you been convicted of a crime or any other discreditable act?**  No  Yes\*  
*\*If yes, provide a statement of explanation on a separate sheet.*

3. **Since your last renewal, have you had a CPA certificate, license or permit disciplined, surrendered, suspended or revoked?**  No  Yes\*  
*\*If yes, provide a statement of explanation on a separate sheet.*

### 4. RETIRED STATUS REQUEST - **Read all statements and sign below.**

1. I am 55 years of age or older;
2. My license was in good standing with the board at the time I last held a license under MN Statutes 326A (2020);
3. I am not required to have an active certificate in Minnesota;
4. I am no longer practicing public accounting in any jurisdiction and will not in future engage in the practice of public accounting in Minnesota without obtaining an active certificate;
5. I will not use the CPA designation in a way that may lead a person to believe that I hold an active certificate in Minnesota; and
6. I will place the word “retired” adjacent to my CPA title.

**I swear or affirm that I have read the foregoing application and that the statements are true and complete. If signing electronically, I agree that my electronic signature shall constitute the execution of this document in exactly the same manner as if I had signed by hand.**

Signature	
Printed Name	Date