



**California Board of Accountancy**  
 2450 Venture Oaks Way, Suite 300  
 Sacramento, CA 95833

phone: (916) 263-3680 fax: (916) 263-3675 web: www.cba.ca.gov



## AUTHORIZATION FOR THE RELEASE OF CALIFORNIA BOARD OF ACCOUNTANCY (CBA) RECORD(S)

**To avoid delays in processing and to ensure that the correct information is provided, it is important that you provide as much identifying information on this document as possible.** For the CBA to process your request, please complete the release statement and sign your name at the bottom, as this is your authorization for the CBA to release your information. **Authorization forms received without a signature and/or fee will be returned without processing.**

### RELEASE STATEMENT

I hereby authorize the California Board of Accountancy to provide all pertinent information on this form.

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

Please **mail\*** the record(s) to the following address:

\_\_\_\_\_  
 Printed Name

\_\_\_\_\_  
 Address

\_\_\_\_\_  
 City, State, Zip, Country

\*If you are requesting the certification(s) be mailed to **you** for inclusion with your application for licensure with another state board or third-party agency, please list that address below:

\_\_\_\_\_  
 Printed Name

\_\_\_\_\_  
 Address

\_\_\_\_\_  
 City, State, Zip, Country

### YOUR CONTACT INFORMATION

In case we need to contact you for additional information, please provide the CBA with your name, address, daytime telephone number, fax number, and email address.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip, Country: \_\_\_\_\_

Daytime Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_ Email: \_\_\_\_\_

## SAMPLE CBA RECORDS

The following images are samples of the various CBA records you may request using this form. These examples are provided to give you a general idea of which certification(s) you should select, based on the purpose for which they will serve. After you have determined which certification(s) you need, please continue to the Records Selection Charts on page 3.

### Certification 1 Interstate Exchange

**SECTION A - EXAMINATION** (Passing grade is 75)

Passed the CPA Exam as a California candidate.  
 The applicant's CPA Exam scores were transferred from the State of \_\_\_\_\_.

The exam scores were previously graded by the AICPA. The grades have not been modified unless noted in Section 7.

EXAM	DATE	FAR	ARE	PRACTICE
1927	1/27/27	75	75	75

**SECTION B - LICENSE INFORMATION**

This individual is currently licensed as a Certified Public Accountant in California.

**SECTION C - LICENSE STATUS**

License No. 12345

This individual is not currently licensed as a Certified Public Accountant in California.

**SECTION D - LICENSE STATUS**

This licensee is currently licensed to engage in the practice of public accountancy.

Certification #1 is used when a California candidate is transferring CPA exam scores and/or license information to another state board.

### Certification 2 Exam Scores

**SECTION A - EXAMINATION**

RE: John M. Smith

DATE OF EXAM	FAR	ARE	PRACTICE
1/27/27	75	75	75

The passing grade for each section of the Uniform Certified Public Accountant Examination in California is 75.

Certification #2 displays each date an exam candidate sat for the CPA Exam and each score earned.

### Certification 3 Exam Passage

**SECTION A - EXAMINATION**

RE: John M. Smith

The passing grade for each section of the Uniform Certified Public Accountant Examination in California is 75.

Certification #3 confirms the successful passage of the CPA Exam and does not list the scores earned.

### Certification 4 License Status

**SECTION A - EXAMINATION**

RE: John M. Smith

Our records show that John M. Smith is the holder of California Certified Public Accountant License No. 12345 issued April 4, 1927. John M. Smith's license period is April 4, 1927.

Certification #4 shows your current license status, and can be used for a CPA or an Accountancy Firm license. This information is available at no charge in License Look Up on the CBA's Web site at [www.cba.ca.gov](http://www.cba.ca.gov)

### Certification 5 License History

**SECTION A - EXAMINATION**

RE: John M. Smith

- The certificate was expired and was not valid during the period February 1, 1920 through January 31, 1921.
- On January 28, 1921, the certificate was renewed through January 31, 1923, upon payment of the renewal fee and declaration of compliance with continuing education requirements (active).
- The certificate was renewed for the period February 1, 1924 through January 31, 1925, with continuation (active).
- The certificate was renewed for the period February 1, 1926 through January 31, 1928, with continuation (active).
- The certificate was renewed for the period February 1, 1929 through January 31, 1930, with continuation (active).
- The certificate expired on January 31, 1930 and is currently in a 'delinquent' status.
- The individual is not currently licensed as a Certified Public Accountant in California.

Certification #5 details the entire history of your CPA or Accountancy Firm license, including past license status, disciplinary actions, and information on each renewal cycle since your license was issued.

### Certification 6 Certificates of Experience

**SECTION A - EXAMINATION**

RE: John M. Smith

The following is a list of Certificates of Experience (Formerly Form E) submitted by John M. Smith:

DATE	SIGNATURE
1/27/27	John M. Smith

Certification #6 provides certified copies of your Certificates of Experience submitted by your employer(s) at the time of your application for licensure.

## RECORDS SELECTION CHARTS

In the tables below, please identify the record(s) you would like to release to the recipient identified on page 1. For sample images of the certification and record types below, please see page 2.

<b><u>CERTIFIED CBA RECORDS</u></b>			
<p>In the space provided, choose the type and number of certifications needed, and calculate the total fee required. Payment of \$25 for each certification must be enclosed with the completed request form. For example, a request for 3 certified copies of #1 at \$25 = \$75. Incomplete requests, or requests received without the appropriate fees will be returned without processing.</p>			
Certification Type	Description	Quantity	Certification Fee (\$25 ea)
<b>EXAMINATION AND LICENSURE INFORMATION</b>			
<b>1 Interstate Exchange</b>	This document provides: <ul style="list-style-type: none"> <li>• CPA Exam scores</li> <li>• California Ethics Exam results (if applicable)</li> <li>• CPA License status (if applicable)</li> <li>• Disciplinary action (if applicable)</li> </ul> This certification is generally used for obtaining licensure in another state.		
<b>UNIFORM CPA EXAMINATION INFORMATION</b>			
<b>2 Exam Scores</b>	This letter confirms sitting for each section of the CPA Exam and identifies the dates sat and scores earned.		
<b>3 Exam Passage</b>	This letter confirms only the successful passage of the CPA Exam.		
<b>CPA OR ACCOUNTANCY FIRM LICENSE INFORMATION</b>			
<b>4 License Status</b>	This letter provides the current status of your CPA or Accountancy Firm license		
<b>5 License History</b>	This letter provides the history of your CPA or Accountancy Firm license.		
<b>CERTIFIED COPIES OF CERTIFICATES OF EXPERIENCE</b>			
<b>6 Certificates of Experience</b>	This document provides certified copies of all Certificates of Experience (Formerly Form E or Form G) on file.		
		<b>Total Quantity</b>	<b>Total Fees</b>
			\$

**ADDITIONAL INFORMATION**

After determining the type of record(s) needed from the Records Selection Charts on page 3, please complete the following sections. **It is very important that you provide as much identifying information as possible.**

The License number and license expiration date for all California CPAs and Accountancy Firms can be obtained on the License Look-Up Feature on the CBA’s Web site at *www.cba.ca.gov*.

**CPA EXAM INFORMATION**

California Unique Identifier Number: \_\_\_\_\_

Full name (including maiden name, if applicable) used on California CPA Exam Application: \_\_\_\_\_

\_\_\_\_\_  
First Middle Last

Last date you sat for the CPA Exam in California: \_\_\_\_\_

**CPA LICENSE INFORMATION**

Are you licensed to practice public accounting in California?  Yes  No

California License No.: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

If no, have you applied for a California CPA License?  Yes  No

Date applied for Licensure: \_\_\_\_\_

Do you have an approved Fictitious Name Permit registered with the CBA?  Yes  No

**FIRM LICENSURE INFORMATION**

Type of firm license  Partnership  Corporation

Name of Firm: \_\_\_\_\_

Firm License No.: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

**COMMENTS**

\_\_\_\_\_  
\_\_\_\_\_

## **INSTRUCTIONS FOR AUTHORIZING THE RELEASE OF YOUR CALIFORNIA BOARD OF ACCOUNTANCY (CBA) RECORD(S)**

**This form is used for authorizing the CBA to release Certified copies of your record(s) to specified recipients.**

Individuals interested in transferring their Uniform CPA Examination (CPA Exam) scores and/or license status to another state are encouraged to inquire about that state's requirements **prior** to submitting a request for certified CBA record(s). If you would like to request certified information regarding your supervisor or employer's CPA or Accountancy Firm license, please use the *Request for License Verification Form*, located on the CBA's Web site at [www.cba.ca.gov](http://www.cba.ca.gov).

Please note, the License Look-Up feature on the CBA's Web site also contains license status information on all California CPAs and Accountancy Firms. License status information is updated nightly to display up-to-date data, and is available on the CBA's Web site free of charge to all interested parties.

### **Step 1. Please carefully review all of the instructions on this form.**

If you have questions or are unable to locate the information you need, please fax your questions to (916) 263-3676, email [licensinginfo@cba.ca.gov](mailto:licensinginfo@cba.ca.gov), or contact CBA staff at (916) 561-1701.

### **Step 2. Complete the *Authorization for the Release of California Board of Accountancy (CBA) Record(s)* on Page 1.**

To transfer your CPA Exam scores or license status to another state, you may use this authorization form to request the CBA to release your information. You must clearly identify what information is to be transferred, and **provide your signature** to authorize the release of your records. It is not necessary to include a self-addressed stamped envelope, as the CBA provides official envelopes for mailing certified records.

Many states require that applicants include certified board records with their application packet. For this reason, it may be necessary that your records are addressed to the other state board, but mailed to you for inclusion in your application packet. In the Release Statement box on page 1, clearly identify where you would like the records mailed, and to whom they should be addressed.

### **Step 3. Review the Sample CBA Records on Page 2.**

Using the examples of available CBA records on page 2, please review the descriptions of each, and identify the type(s) you would like to request.

### **Step 4. Complete the Records Selection Charts on Page 3.**

Using the Records Selection Charts on page 3, choose the type and number of records you would like to request, and calculate the total fee required.

**To request a certified verification of your supervisor or employer's Accountancy Firm license, please use the *Request for License Verification Form* on the CBA's Web site at [www.cba.ca.gov](http://www.cba.ca.gov).**

### **Step 5. Complete the necessary Additional Information section on Page 4.**

After determining the type of record(s) needed from the Records Selection Charts on page 3, complete the various sections on page 4. **It is very important that you provide as much identifying information as possible.** If insufficient information is provided, the processing of your request may be significantly delayed.

**Step 6. Remit \$25 for each certification with your completed authorization form.**

**The CBA charges \$25 for each certification.** This includes certified letters confirming passage of and/or the scores received on the Uniform CPA Examination, certified verification of your CPA or Accountancy Firm licensure, and certified copies of your Certificates of Experience (formerly Form E or Form G).

Payment for certified CBA records must be made by check, cashier's check, or money order, payable to the California Board of Accountancy. Foreign applicants must verify with their bank that their checks are issued by a United States-affiliated bank and that they are printed with the bank's United States Federal Reserve account number.

License status information on all California CPAs and Accountancy Firms can be obtained without charge on the CBA's Web site. However, it is important to note that **many state boards and/or third-party agencies do not accept non-certified records.**

**Step 7. Please allow 30 days for the CBA to process your record(s) request.**

**The CBA cannot process authorizations which are incomplete, unsigned, or received without payment of the applicable \$25 fee for each certification (for example: 3 certifications at \$25 = \$75).**

The *Authorization for the Release of California Board of Accountancy (CBA) Record(s)* must be completed and signed, as you must approve the CBA's release of your information. **The address(es) where the records are to be addressed and/or mailed must also be completed.**

## **PERSONAL INFORMATION COLLECTION AND ACCESS**

The information provided in the form will be used by the California Board of Accountancy (CBA) to determine that accurate information is provided to the recipient of the document. Sections 5009, 5026 through 5029, 5060, 5070 through 5079, and 5150 through 5158 of the Business and Professions Code authorize the collection of this information. Failure to provide any of the required information is grounds for rejection of the form as being incomplete.

Information provided may be transferred to the Department of Justice, a District Attorney, a City Attorney, or to another government agency as may be necessary to permit the CBA, or the transferee agency, to perform its statutory or constitutional duties, or otherwise transferred or disclosed as provided in the Civil Code Section 1798.24.

Each individual has the right to review his or her file, except as otherwise provided by the Information Practices Act. Upon request, certain information provided may be disclosed to a member of the public under the California Public Records Act.

The Executive Officer of the CBA is responsible for maintaining the information in this form, and may be contacted at 2450 Venture Oaks Way, Suite 300, Sacramento, CA 95833, telephone number (916) 263-3680 regarding questions about this notice or access to records.