

Rutgers AICPA Data Analytics Research Initiative

Application to Participate in the Initiative

This document discusses the roles and responsibilities for licensed U.S. CPA firms who participate in the Rutgers AICPA Data Analytics Research Initiative (the “Initiative”). The governing Charter document (“Charter”) is incorporated by reference into this application. In the event of a conflict between this application to participate and the Charter, the Charter shall control.

Participation in the Initiative means the following:

- ▶ A position on the Initiative’s Advisory Board, and the opportunity to:
 - Determine and oversee the governance and funding structure that will support the Initiative
 - Approve the annual operating budget
 - Approve the scope of research projects and budgets in consultation with the researchers
 - Assess and approve all project resource and funding needs
 - Review, deliberate, approve and oversee project submissions and deliverables, including all materials prior to publication
 - Approve meeting minutes, press releases and marketing materials
- ▶ Funding requirements:
 - Agreement to make a contribution of \$60,000 per year for the first two years, with the yearly contribution paid at the start of each calendar year. The Initiative’s Advisory Board will determine the amounts after the first two years.
 - Participants may withdraw from the two-year commitment after the first year by giving 30 days’ written notice at any time to the other participants of the Advisory Board prior to the one-year anniversary of the Initiative (the “Opt-Out Period”). However, all contributions for the first year are non-refundable. If the notice to withdraw is provided during the second year, then the participant shall receive a pro-rated refund for the number of months remaining in the second year from the date that the notice is provided.
- ▶ Signature of this application denotes an agreement to comply with and abide by the terms of the Initiative’s governing Charter, located [here](#).

If your firm is interested in participating in this initiative, please complete the following form and email it to Dorothy McQuilken at dmcquilken@aicpa.org. Upon receipt of the completed form, you will be sent an invoice with instructions for making the first year’s payment for participation.

Rutgers AICPA Data Analytics Research Initiative **Application to Participate in the Initiative**

My firm agrees to participate in this Initiative on the terms set forth in the application.

Firm _____

Name _____
(Signature)

_____ (Type or print)

Title _____

Telephone _____

Email _____

Date _____

Participant's Application Acceptance Date (to be provided by the Initiative):