

Provisional Product List for NAICS 5412: Accounting, Tax Preparation, Bookkeeping, and Payroll Services*

1 Industry Subject Area	2 Working Group Code	3 Tri- lateral Detail	4 5 6 National Product Detail			7 English Title	8 English Definition	9 10 11 Product Exists in:			12 13 14 NAICS Industries Producing the Product			15 CPC Code
			Can	Méx	US			Can	Méx	US	Can	Méx	US	
5412	1					Assurance, Bookkeeping, Compilation, Payroll, Taxation and Related Services								
5412	1.1					Assurance and Related Services	Financial auditing; tax auditing; review of financial statements with or without compilation; agreed-upon procedures for financial information; and other assurance and related services.	X	X	X	541212 ?	541211		82211 82212 82213 82219? ?
5412	1.1.1					Financial Assurance and Related Services	Financial auditing; tax auditing; review of financial statements with or without compilation; agreed-upon procedures for financial information; and other financial assurance and related services.	X	X	X	541212	541211		82211 82212 82213 82219? ?
5412	1.1.1.1					Financial Auditing Services	Auditing of financial statements or specific financial accounts.	X	X	X	541212	541211		82211
5412	1.1.1.1.1	X				Financial Statement Auditing	An examination of accounting records and other supporting evidence for the purpose of expressing an opinion as to whether financial statements are presented fairly in accordance with an appropriate, disclosed basis of accounting.	X	X	X	541212	541211		82211
5412	1.1.1.1.2	X				Specialized Financial Auditing	Auditing of specific financial accounts.	X	X	X	541212	541211		82211
5412	1.1.1.2	X				Tax Auditing	An examination made by a public accountant empowered by the treasury authorities to rule if a taxpayer with income above a given level has complied with the tax obligations that the law imposes.		X			541211		82211
5412	1.1.1.3					Financial Statement Review Engagements and Agreed-Upon Procedures for Financial Information	Review engagements, with or without compilation services, to assess whether the financial statements being reported on are plausible within the framework of the appropriate criteria; agreed-upon procedures engagements to provide reports on the results of applying client- specified procedures to financial information.	X		X	541212			82212 82213 82219? ?

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5412	1.1.1.3.1	X				Financial Statement Review Engagements	A review consists primarily of enquiry, analytical procedures and discussion related to financial statements and financial information supplied to the accountant with the limited objective of assessing whether the information being reported on is plausible within the framework of the appropriate criteria. Review engagements are distinguishable from audits in that the scope of a review is less than that of an audit and therefore the level of assurance provided is lower. A review does not require the public accountant to seek supporting or independent evidence or to study and evaluate internal control. Review services may be offered with or without compilation services.	X		X	541212	541211		82212 82213
5412	1.1.1.3.1.1		X			Financial Statement Review Engagements without Compilation	A review consists primarily of enquiry, analytical procedures and discussion related to financial statements and financial information supplied to the accountant with the limited objective of assessing whether the information being reported on is plausible within the framework of the appropriate criteria. Review engagements are distinguishable from audits in that the scope of a review is less than that of an audit and therefore the level of assurance provided is lower. A review does not require the public accountant to seek supporting or independent evidence or to study and evaluate internal control.	X		X	541212			82212
5412	1.1.1.3.1.2		X			Financial Statement Review Engagements with Compilation	A bundled service consisting of compilation and review services. Compilation consists of arranging information received from a client into the form of a financial statement, assuring that the assembly of information is arithmetically correct. Review consists primarily of enquiry, analytical procedures and discussion related to the financial statements and supplied financial information with the limited objective of assessing whether the information being reported on is plausible within the framework of the appropriate criteria. Review engagements are distinguishable from audits in that the scope of a review is less than that of an audit and therefore the level of assurance provided is lower. A review does not require the public accountant to seek supporting or independent evidence or to study and evaluate internal control.	X		X	541212			82212 82213

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5412	1.1.1.3.2	X				Agreed-Upon Procedures for Financial Information	Agreed-upon procedures for financial information are engagements to provide reports on the results of applying client-specified procedures to financial information.	X		X	541212	541211		82219? ?
5412	1.1.1.9	X				Other Financial Assurance and Related Services	Other financial assurance and related services	X	X	X	541212	541211		?
5412	1.1.2	X				Nonfinancial Assurance and Related Services	Nonfinancial assurance and related services include audits, reviews and agreed-upon procedures performed in relation to nonfinancial matters, such as assessing compliance with agreements, statutes and regulations; internal control procedures; compliance of public sector entities with legislative and related authorities; value-for-money auditing of public sector entities; the application of accounting principles, auditing standards or review standards; electronic commerce practices; and computer system reliability. Findings are typically conveyed in a written report.	X	X	X	541212 ?	541211		82219? ?
5412	1.1.2.1				X	Compliance Audit Services	Compliance audit services include assessing a client's compliance with agreements, statutes and regulations, and legislative and related authorities. Findings are typically conveyed in a written report.	X		X	541212 ?			82219? ?
5412	1.1.2.2				X	Computer Audit Services	Computer audit services independently test, verify, and provide an assurance as to the reliability of a computer system. Reliability is assessed by examining the system's availability, security, integrity and maintainability. A licensed CPA will provide independent verification that a company has effective system controls and safeguards so that a system can function reliably and will issue an assurance report to company management.	X		X	541212 ?			82219? ?
5412	1.1.2.9				X	Other Nonfinancial Assurance and Related Services, n.e.c.	Other nonfinancial assurance and related services, n.e.c	X	X	X	541212 ?	541211		82219? ?
5412	1.2					Bookkeeping, Compilation, Payroll and Taxation Services	Bookkeeping services, compilation of financial statements, payroll services and taxation services.	X	X	X	541212 541213 541215 54111	541211 541219 541110		82213 82220 82310 82320 82330 85920 85990

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			Can	Méx	US			Can	Méx	US	Can	Méx	US	
5412	1.2.1	X				General Accounting Services	Includes bookkeeping, compilation, and one or more of the following services, sold for a single fee: payroll services or tax preparation services. Excludes bookkeeping and compilation combined with payroll calculations only, which is covered in Bookkeeping and Compilation Services.	X	X	X	541212	541211		82213 82220 82320 82330 85920 85990
5412	1.2.1.1			X		General Accounting Services, excluding Payroll Calculation Services	This service includes the conduct of a variety of combined activities, such as the revision of notes, receipts, invoices, etc., and their registration, the reconciliation of bank balances, preparation of financial statements and the preparation of tax declarations.		X			541211		82213 82220 82320 82330 85920
5412	1.2.1.2			X		General Accounting Services and Payroll Calculation Services	Accounting services which include the revision of notes, receipts, invoices, etc., and their registration, the reconciliation of bank balances, the preparation of financial statements, the preparation of tax declarations and payroll calculation services.		X			541211		82213 82220 82320 82330 85920 85990
5412	1.2.1.3				X	General Accounting, including Bookkeeping, Compilation and Taxation Services	This service includes the sale of combined bookkeeping, compilation, and taxation services to a client for a single fee. Bookkeeping services may include general transaction entry, including maintenance of all journals and ledgers, preparation of trial balances and bank reconciliations and production of management information reports, billing and collection of accounts receivable, and processing of accounts payable. Compilation services may include arranging information received from a client into the form of a financial statement, and assuring that the assembly of information is arithmetically correct (without verifying the accuracy or completeness of the information provided). Taxation services may include preparation, review or filing of tax returns or supplementary documents. Excludes bookkeeping and compilation combined with payroll calculations only, which is covered in Bookkeeping and Compilation Services.			X				82213 82220 82320 82330 85920

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5412	1.2.1.4				X	Full-Service General Accounting, including Bookkeeping, Compilation, Payroll, and Taxation Services.	This service includes the sale of combined bookkeeping, compilation, payroll and taxation services to a client for a single fee. Bookkeeping services may include general transaction entry, including maintenance of all journals and ledgers, preparation of trial balances and bank reconciliations and production of management information reports, billing and collection of accounts receivable, and processing of accounts payable. Compilation services may include arranging information received from a client into the form of a financial statement, and assuring that the assembly of information is arithmetically correct (without verifying the accuracy or completeness of the information provided). Payroll services may include payroll processing, withholding deductions, remitting deductions and employer's contributions to government-mandated and other plans, and filing reports. Taxation services may include preparation, review or filing of tax returns or supplementary documents. Excludes bookkeeping and compilation combined with payroll calculations only, which is cov			X				82213 82220 82320 82330 85920 85990
5412	1.2.1.5				X	Other General Accounting Service Bundles	Other general accounting service bundles, such as bookkeeping, compilation, and payroll services sold for a single fee. Excludes bookkeeping and compilation combined with payroll calculations only, which is covered in Bookkeeping and Compilation Services.			X				82213 82220 85920 85990
5412	1.2.2	X				Bookkeeping and Compilation Services	Bookkeeping services and compilation of financial statements. Bookkeeping services may include payroll calculation services. Excludes payroll services alone, which are covered in Payroll Services. Excludes combinations of bookkeeping and compilation and payroll services, where payroll services involve more than payroll calculations. Such services are covered in General Accounting Services. Excludes compilation combined with tax preparation, which is covered in Tax Preparation and Representation Services.	X		X	541212 541215	541211		82213 82220 85920 85990

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5412	1.2.2.1				X	Full-service Bookkeeping with Compilation Services	A bundled service consisting of full-service bookkeeping and compilation services. Full-service bookkeeping services include general transaction entry, including maintenance of all journals and ledgers, preparation of trial balances and bank reconciliations and production of management information reports; billing and collection of accounts receivable; and processing of accounts payable. Bookkeeping services may include payroll calculation services. Compilation services include arrangement of information from a client into the form of a financial statement. Excludes combinations of bookkeeping and compilation and payroll services, where payroll services involve more than payroll calculations. Such services are covered in General Accounting Services. Excludes compilation combined with tax preparation, which is covered in Tax Preparation and Representation Services.	X		X	541212			82213 82220 85920 85990
5412	1.2.2.2				X	Bookkeeping Services Sold Separately	Bookkeeping services sold separately includes the stand alone sale of individual bookkeeping services, such as billing and collection of accounts receivable; accounts payable processing; reconciliation of bank statements; and other bookkeeping services.	X		X	541215			82220 85920
5412	1.2.2.2.1				X	Billing and Collection of Accounts Receivable	Preparing invoices and statements and collecting payments on behalf of the client. This service is not to be confused with the recovery of delinquent accounts or sales financing.	X		X	541215			85920
5412	1.2.2.2.2				X	Accounts Payable Processing	Paying bills, managing cash flow and making the appropriate entries into the general ledger.	X		X	541215			82220
5412	1.2.2.2.3				X	Reconciliation of Bank Statements	Ensuring that deposits, payments, and withdrawals are accounted for on the client's bank statement.	X		X	541215			82220
5412	1.2.2.2.4				X	Other Bookkeeping Services	Includes other bookkeeping services sold separately, n.e.c	X		X	541215			82220

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5412	1.2.2.3		X			Bookkeeping Services	A service consisting of general transaction entry, including maintenance of all journals and ledgers, preparation of trial balances and bank reconciliations and production of management information reports; billing and collection of accounts receivable; and processing of accounts payable. May include payroll calculation services. Excludes payroll services alone, which are covered in Payroll Services. Excludes combinations of bookkeeping and compilation and payroll services, where payroll services involve more than payroll calculations. Such services are covered in General Accounting Services.	X		X	541215			82220 85920 85990
5412	1.2.2.4		X		X	Compilation (Canadian title) / Compilation Services Sold Separately (U.S. title)	A compilation engagement is one in which an accountant receives information from a client and arranges it into the form of a financial statement. The accountant assures that the assembly of information is arithmetically correct. However, the accountant does not attempt to verify the accuracy or completeness of the information provided, and no endorsement or expression of assurance is provided. Excludes combinations of bookkeeping and compilation and one or both of payroll and taxation services, which are covered in General Accounting Services. Excludes compilation combined with tax preparation, which is covered in Tax Preparation and Representation Services.	X		X	541212			82213
5412	1.2.3	X				Payroll Services	Payroll processing, withholding deductions, remitting deductions and employer's contributions to government-mandated and other plans, and filing reports.	X	X	X	541215	541211		85990
5412	1.2.3.1				X	Full-service Payroll services	Collection of payroll information and processing of paycheques, pay deposits and pay statements. Withholding amounts from employees' pay for government-mandated and other deductions; remitting the amounts withheld to the appropriate authorities and plan administrators; and filing regulatory and tax reports with regard to the deductions. Remitting the employer's contribution and filing regulatory and tax reports with regard to government-mandated and other contributions by the employer to employee benefit plans. Preparation of special payroll reports at client's request.	X		X	541215			85990

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5412	1.2.3.2				X	Payroll Services Sold Separately	Payroll services sold separately includes the stand alone sale of individual payroll services, such as payroll calculation services, customized payroll reports; payroll deduction, remittance, and reporting; and other payroll services.	X		X	541215			85990
5412	1.2.3.2.1			X	X	Payroll Calculation Services	Calculation of employees' pay, of deductions from the employees' pay, and of the employer's contributions to government-mandated and other employee benefit plans	X	X	X	541215	541211		85990
5412	1.2.3.2.2				X	Processing Paychecks and Pay Deposits	Collection of payroll information and processing of paycheques, pay deposits and pay statements.	X		X	541215			85990
5412	1.2.3.2.3			X	X	Customized Payroll Reports	Preparation of special payroll reports at client's request	X	X	X	541215	541211		85990
5412	1.2.3.2.4				X	Payroll Deduction, Remittance, and Reporting	This service consists of - withholding amounts from employees' pay for government-mandated and other deductions; remitting the amounts withheld to the appropriate authorities and plan administrators; and filing regulatory and tax reports with regard to the deductions. Government-mandated deductions vary by jurisdiction. Some examples of government-mandated deductions are income taxes, (un)employment insurance, social insurance, and wage garnishment (court-ordered debt, alimony, or child support payments). Some examples of deductions not mandated by government are retirement savings plans, pension plans and health plans. - remitting the employer's contribution and filing regulatory and tax reports with regard to government-mandated and other contributions by the employer to employee benefit plans such as (un)employment insurance, social insurance, workplace safety, pension plans and health insurance.	X		X	541215			85990
5412	1.2.3.2.5			X	X	Other Payroll Services	Other payroll services sold separately, n.e.c	X	X	X	541215	541211		85990
5412	1.2.4					Taxation Services	Planning and consulting in order to minimize the impact of taxation; interpreting tax law; preparation, review or filing of tax returns or supplementary documents; preparation for and representation at tax audits and appeals.	X	X	X	541212 541213 54111	541211 541219 541110		82213 82310 82320 82330
5412	1.2.4.1					Tax Planning and Consulting Services	Planning and consulting in order to minimize the impact of taxation, and interpreting tax law.	X	X	X	541212 54111	541211 541110		82310 82330
5412	1.2.4.1.1	X				Tax Planning and Consulting Services for Individuals and Unincorporated Businesses	Planning and consulting in order to minimize the impact of taxation, and interpreting tax law, for individuals and unincorporated businesses.	X	X	X	541212 54111	541211		82330

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5412	1.2.4.1.1.1			X	X	Short-term Tax Advice to Individuals and Unincorporated Businesses	Preparing scenarios to demonstrate the impact alternative client decisions would have on the client's short-term tax burden. Advising clients on the means of minimizing the impact of tax by taking advantage of all allowances and benefits that the law provides.	X	X	X	541212 54111	541211		82330
5412	1.2.4.1.1.2			X	X	Long-term Tax Planning Services for Individuals and Unincorporated Businesses	Planning the affairs of an individual, family or unincorporated business with a view to minimizing the impact of taxation. Pertains to all taxes paid by persons or unincorporated businesses, including income taxes; inheritance, estate, probate and succession duties and taxes; property taxes; and other taxes related to operating an unincorporated business or employing staff, such as payroll taxes, municipal business taxes, value added taxes, retail sales taxes and other commodity taxes.	X	X	X	541212 54111	541211		82330
5412	1.2.4.1.1.3			X	X	Tax Consulting Services for Individuals and Unincorporated Businesses	Providing an interpretation of tax law to individuals and unincorporated businesses	X	X	X	541212 54111	541211 541110		82330
5412	1.2.4.1.2	X				Tax Planning and Consulting Services for Corporate and Other Clients	Planning and consulting in order to minimize the impact of taxation, and interpreting tax law for corporate and other clients.	X	X	X	541212 54111	541211		82310
5412	1.2.4.1.2.1			X	X	Tax Planning Services for Corporate and Other Clients	Planning the affairs of an organization with a view to minimizing the impact of taxation. (Other clients include public sector entities, non-profit organizations, charities, registered plans and trusts except estates.)	X	X	X	541212 54111	541211		82310
5412	1.2.4.1.2.2			X	X	Tax Consulting Services for Corporate and Other Clients	Tax consulting includes providing an interpretation of tax law to corporate and other clients. Tax consulting also includes verifying taxes charged to the organization (examples: property taxes, import duties).	X	X	X	541212 54111	541211 541110		82310
5412	1.2.4.2	X				Tax Preparation and Representation Services	One or more of the following services: preparation of income and other tax returns; review of returns prepared by others; filing of returns; preparation of supplementary documents associated with returns; preparation for and representation at tax audits and appeals. Includes compilation of financial statements when provided as a package with tax preparation for a single fee.	X	X	X	541212 541213 54111	541211 541219		82213 82320 82330

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5412	1.2.4.2.1		X		X	Tax Preparation and Representation Services for Individuals and Unincorporated Businesses	One or more of the following services, for individuals and unincorporated businesses: preparation of income and other tax returns; review of returns prepared by others; filing of returns; preparation of supplementary documents associated with returns; preparation for and representation at tax audits and appeals. Includes compilation of financial statements when provided as a package with tax preparation for a single fee.	X	X	X	541212 541213 54111			82213 82330
5412	1.2.4.2.2		X		X	Tax Preparation and Representation Services for Corporate and Other Clients	One or more of the following services, for corporate and other clients: preparation of income and other tax returns; review of returns prepared by others; filing of returns; preparation of supplementary documents associated with returns; preparation for and representation at tax audits and appeals. Includes compilation of financial statements when provided as a package with tax preparation for a single fee.	X	X	X	541212 541213 54111			82213 82320
5412	1.3	X				Computerized Accounting Systems Services	One or more of the following services: consultation, design, development, installation or customization of a computerized accounting system, or provision of training and support to enable the client to use the computerized accounting system.	X	X	X	541212 54151	541211 541510		83141 83142 92900
5412	1.3.1				X	Full-Service Provision of Computerized Accounting System	Design, installation and customization of a computerized accounting system and provision of training and support to enable the client to use the computerized accounting system.	X	X	X	541212 54151			83141 83142 92900
5412	1.3.2				X	Computerized Accounting Systems Services Sold Separately	Computerized accounting systems services sold separately includes the stand alone sale of individual computerized accounting systems services, such as computerized accounting systems consultation services; design and installation of computerized accounting systems; design of computerized accounting systems; installation of computerized accounting systems; customization of computerized accounting systems; training and support in use of computerized accounting systems; and other computerized accounting system services.	X	X	X	541212 54151			83141 83142 92900
5412	1.3.2.1				X	Computerized Accounting Systems Consultation Services	Consultation to determine the user's accounting needs, analysis of the user's existing accounting system, and provision of information regarding computerized accounting systems	X	X	X	541212 54151			83141 83142

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5412	1.3.2.2				X	Design and Installation of Computerized Accounting Systems	The design and installation of a computerized accounting system, provided as one service.	X	X	X	541212 54151			83141 83142
5412	1.3.2.3				X	Design of Computerized Accounting Systems	The design of a computerized accounting system, based on consultation to determine the user's accounting needs and determination of specific software and hardware to meet the user's needs.	X	X	X	541212 54151			83141 83142
5412	1.3.2.4				X	Installation of Computerized Accounting Systems	Installing the software and hardware components of a computerized accounting system.	X	X	X	541212 54151			83141 83142
5412	1.3.2.5				X	Customization of Computerized Accounting Systems	Modification or customization of installed accounting software to meet the user's needs.	X	X	X	541212 54151			83141 83142
5412	1.3.2.6				X	Training and Support in Use of Computerized Accounting Systems	Provision of training and support to enable the client to use the computerized accounting system.	X	X	X	541212 54151			92900
5412	1.3.2.7				X	Other Computerized Accounting Systems Services	Includes other computerized accounting systems services, n.e.c	X	X	X	541212 54151			83141 83142
5412	1.4	X				Management Consulting Services	Management consulting services in the areas of strategic and organizational planning, finance, human resources, marketing and production; executive search services and other management consulting services.	X	X	X	541212 5416	541211 541610		83111 83112 83113 85111 83114 83115 83119
5412	1.5					Related Services	Other services provided by Accounting, Tax Preparation, Bookkeeping and Payroll Service industries.	X	X	X	541212 54111 541611 541990 52 ?	541211 541110 52?		7155 821 82130 822 823 83112 82400 92900
5412	1.5.1	X				Insolvency and Receivership Services	A service involving overseeing the dissolution (bankruptcy) of a firm, payment of all creditors possible, and filing of the necessary documents in compliance with government regulation.	X	X	X	541212 54111 541990	541211 541110		82400
5412	1.5.2	X				Business Incorporation Services	The filing of the appropriate documents with the appropriate agency in order for an individual or group of individuals to do business as a corporation.	X	X	X	541212 54111	541211 541110		82130
5412	1.5.3	X				Personal Financial Planning Services	A service assisting individuals in planning for financial goals. This service may include examining the individual's tax situation. The firm may provide investment advice and make investments on the client's behalf as well.	X	X	X	541212 54111 52	541211 52?		7155

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			Can	Méz	US			Can	Méz	US	Can	Méz	US	
5412	1.5.4	X				Legal Services	Legal advisory, representation, documentation, certification, arbitration, conciliation and other services.	X	X	X	541212 54111	541211 541110		821
5412	1.5.5	X				Accounting Training Services	Training in the accounting system, accounting theory, procedures and strategy.	X	X	X	541212	541211		92900
5412	1.5.6	X				Other Related Services	Other services n.e.c. provided by Accounting, Tax Preparation, Bookkeeping and Payroll Service industries.	X	X	X	541212 541611 ?	541211		822 823 83112
5412	1.5.6.1				X	Litigation Support Services	Providing services in support of litigation, such as lost profit analysis, valuation analysis, potential loss identification, discovery request assistance, settlement negotiations, business interruption cost assessments, estate and trust settlement, divorce settlements, feasibility studies for acquisitions, divestitures, or business expansion, and lost earnings calculations.	X	X	X	541212			822 823 83112
5412	1.5.6.2				X	Business Valuation Services	Performing an appraisal of a business for various purposes, such as acquisition or disposition, writing a buy or sell agreement, estate and gift tax compliance, determining minority interest, and litigation and dissenting shareholder disputes.	X	X	X	541212 541611			83112

* A question mark (?) in columns 9 through 15 indicates that the information is unknown or particularly uncertain at this time.