

**TAX CONSULTANT
INITIAL APPLICATION**

Include Examinee # _____
PTIN # P- _____

For Office Use Only

Do NOT email this form

Questions?
(503)378-4034
Email: tax.bd@oregon.gov

OREGON STATE BOARD OF TAX PRACTITIONERS
3218 Pringle Rd SE, Ste 120, Salem OR 97302

Fax (503)585-5797
Website: www.oregon.gov/OBTP

1 MAILING ADDRESS PER OAR 800-010-0041 ~ ALL LICENSEES SHALL IMMEDIATELY NOTIFY THE BOARD UPON ANY CHANGES TO SECTION #1.

"LEGAL NAME" Last:			First:	Middle:
Mailing Address:				
City:	State:	Zip Code:	County:	
Residence Address:				
City:	State:	Zip Code:	County:	
Cell Phone:	Home Phone:	Business Phone:		
Fax:	E-Mail:			

2 COMPLIANCE Attach an explanation and provide date(s), location, and summary.

Has a license in any other occupation or professional capacity issued in your name by any governmental entity ever been refused, suspended, revoked, or restricted, OR have you ever voluntarily relinquished a professional license? Yes No

Are you aware of any current, proposed, pending or threatened professional complaints or civil or criminal action against you? Yes No

Have you been convicted of, OR are you now under indictment for any criminal offense(s) of which an essential element is dishonesty, fraud or deception, per ORS 673.700(4)(b)? Yes No

Have you ever been required to appear before or been sanctioned by any professional body or federal or state agency for alleged misconduct? Yes No

3 EMPLOYMENT

Are you currently an employee who prepares, assists or advises in the preparation of personal income taxes? Yes No

Employing Business: _____

Designated Consultant: _____

4 SIGNATURE

Under penalty of perjury, I declare that I have examined this application, including any accompanying attachments, and to the best of my knowledge and belief, it is true, correct, and complete.

Signature _____ Date: _____

5 FEES

For a combination consultant license and business registration, you **must** fill out a Business Registration Application and submit it with your Consultant License Application. Business Registration Applications are located on the Forms page of the website: www.oregon.gov/OBTP

- | | |
|---|---|
| FOR ACTIVE LTP LICENSEES | FOR NEW LICENSEES |
| <input type="checkbox"/> Consultant License Only (LTC) ~ \$65 | <input type="checkbox"/> LTC License Only ~ \$95 |
| <input type="checkbox"/> Combo LTC License/Tax Business Reg ~ \$125 | <input type="checkbox"/> Combo LTC License/Tax Business Reg ~ \$155 |

TOTAL FEES: \$ _____

6 CHECK OR MONEY ORDER

Mail to:

STATE BOARD OF TAX PRACTITIONERS
3218 Pringle Rd SE, Ste 120
Salem, OR 97302

CREDIT CARD PAYMENT

3218 Pringle Rd SE, Ste 120, Salem, OR 97302
or FAX (503) 585-5797

Exp: ____/____

NUMBER _____

BILLING ADDRESS _____

BILLING ZIP CODE _____



IMPORTANT INFORMATION

A) TO RECEIVE YOUR CONSULTANT LICENSE:

1. Complete the form on the other side of this page. If your plans for employment are unknown when you apply for licensing, fill out only Sections 1, 2, 4, 5 and 6 of the application.
2. Return this completed application and applicable fee (see Section #5) to the Board of Tax Practitioners within **60 days of the date of exam**. If you do not send the required materials by this deadline, you must retake the exam to become licensed.
3. Licenses will not be processed until all required information and fees are received and processed by the Board office.
4. Licenses must be conspicuously displayed in the holder's place of tax employment.
5. No continuing education credit is required for the *first renewal* of a tax consultant's license. A minimum of **30 hours** continuing education must be completed during each license period thereafter.

B) OWNER/OPERATOR OF A BUSINESS:

1. If your tax business will operate under a name other than your personal name, or if the firm is a corporation the business name and/or the corporation must be registered with the Oregon Secretary of State Corporation Division. For more information, contact the Corporation Division web site at: sos.oregon.gov or (503) 986-2200.
2. Complete the enclosed application for a Tax Return Preparation Business Registration and return the completed form to the Board office with applicable fee. (See Section #5 for restrictions on eligibility for a combination LTC license/Tax Business Registration.)
A tax preparation business may *not* offer services to the public until it has completed registration requirements.
3. If your tax business has more than one licensee-owner, only one of the owners needs to complete a tax business registration. The additional owners need only an individual LTC license.
4. Each tax preparation business must appoint and report to the Board the name of a "Designated Consultant" who will have overall responsibility for the tax activities of the firm. Completing the Designated Consultant information on the Tax Business Registration form fulfills this requirement.
5. Each office of a tax preparation business must be staffed by a "Resident Consultant" during normal daily business hours, see OAR 800-025-0060.
6. Tax consultant licenses and tax business registrations expire May 31st. The Board office will send Consultant Renewal Notices and Tax Business Registrations at least 30 days prior to expiration date.

The Board's website contains useful information for Tax Practitioners.

Please visit www.oregon.gov/OBTP for monthly Newsletters, Board Meeting announcements and Minutes, Oregon Statutes and Administrative Rules and other resources.

If you have any questions contact the Board office.

E-MAIL ADDRESSES

Please inform the Board office immediately regarding *any* change to your e-mail address. The Board uses e-mail addresses as a form of communication to notify licensees of information distributed by the Board. This includes but is not limited to newsletters, renewal notices and rule changes.