

**TAX PREPARER
INITIAL APPLICATION**
Include Examinee #: _____

Phone: 503-378-4034 Fax: 503-378-3575 E-mail: tax.bd@state.or.us Website: www.oregon.gov/OTPB

1 **MAILING ADDRESS:** Per OAR 800-010-0041 ~ All licensees shall immediately notify the Board upon any changes to Sections #1.
PLEASE PRINT OR TYPE

"LEGAL NAME" Last	First	Middle
MAILING ADDRESS:		
City:	State:	Zip Code: County:
RESIDENCE ADDRESS (IF DIFFERENT):		
City:	State:	Zip Code: County:
Residence Phone No.:	Business Phone No.:	
Fax:	*E-Mail:	

Please provide the Board of Tax Practitioners with your current e-mail address to assure receipt of Board information.

2 **COMPLIANCE:**
Has a license in any other occupation or professional capacity issued in your name in any state or by the federal government ever been refused, suspended, revoked, or restricted?
Yes No If yes, attach an explanation and provide date(s), location, and nature of offenses(s).

Have you ever been convicted of, OR are you now under indictment for any criminal offense(s) which an established element is dishonesty, fraud or deception, per ORS 673.700(4)(b)?
Yes No If yes, attach an explanation and provide date(s), location, and nature of offenses(s).

3 **EMPLOYMENT:**
To work as a preparer, you must be supervised by a Licensed Tax Consultant, CPA, or PA per ORS 673.615(2). Please provide the information below.
Last or Current Employer: _____ Year Employed: _____
Designated Consultant (LTC) or Supervisor (if CPA, or PA): _____

4 **EDUCATION:**
Attach 80-Hour Basic Course certificate to this application.

5 **SIGNATURE:**
Under penalties of perjury, I declare that I have examined this application, including any accompanying attachments (if any) and to the best of my knowledge and belief, it is true, correct, and complete.
Signature of Licensee: _____ Date: _____

6 **FEES:**
For a combination preparer license and business registration, you must fill out a Business Registration Application and submit it with your Preparer License Application. Business Registration Applications are located on the agency's website at: <http://www.oregon.gov/OTPB/Forms.shtml>
a) Preparer License Only (LTP) ~ \$80 b) Combo LTP License/Tax Business Registration ~ \$155
TOTAL FEES: \$ _____

7 **MAIL PAYMENT TO:** STATE BOARD OF TAX PRACTITIONERS
UNIT 07
PO BOX 4395
PORTLAND, OR 97208
OR
FAX PAYMENT TO: (503) 378-3575 (if paying by credit/debit card)
Credit/Debit Card Visa ___ MC ___ DC ___ Number _____ Expires _____

PLEASE READ INSTRUCTIONS ON BACK OF THIS PAGE

ATTENTION TAX PREPARERS!
IMPORTANT THINGS FOR YOU TO KNOW!

A) TO RECEIVE YOUR PREPARER 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, 5, 6 and 7 of the application.
2. Return this completed form, the 80 Hour Basic Course certificate and applicable fee (see Section #6 on other side of this page) 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 preparer'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 you will be an owner/operator of a business that offers tax preparation services, contact the Board of Tax Practitioners prior to advertising or offering services.
2. Tax preparer licenses and tax business registrations expire September 30 following initial issuance. The Board office will mail out Preparer Renewal Notices to the address that the Board office has on file at least 30 days prior to expiration date.

PLEASE DOWNLOAD A COPY OF THE BOARD OF TAX PRACTITIONERS LAWS AND RULES FROM THE AGENCY'S WEBSITE AT: www.oregon.gov/OTPB .
MAKE SURE YOU ARE KNOWLEDGEABLE ABOUT THE LAWS AND RULES.
THEY HAVE ADDITIONAL INFORMATION ABOUT LICENSING AS WELL AS TAX PREPARATION AND OPERATION OF A TAX RETURN PREPARATION BUSINESS.
IF YOU HAVE QUESTIONS ABOUT LICENSING OR A TAX BUSINESSES,
CONTACT THE BOARD OFFICE.

E-MAIL ADDRESS CHANGES

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 pertinent information distributed by the Board.
This includes but is not limited to newsletters, press releases, rule changes and any other information the Board deems significant to licensees.
