FORM **P-APP**

TAX PREPARER INITIAL APPLICATION

(Required) **PTIN # P-_____**

use this website to obtain your PTIN number:
https://rpr.irs.gov/datamart/mainMenuUSIRS.do

For Office Use Only

Questions?

Do **NOT** email this form

(503) 378-4034

OREGON STATE BOARD OF TAX PRACTITIONERS

Fax (503) 585-5797

Email: tax.bd@oregon.gov

3218 Pringle Rd SE, Ste 250, Salem OR 97302

Website: www.oregon.gov/OBTP

1 MAILING ADDRESS

All fields must be completed or your application will not be processed.

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

2 COMPLIANCE

*If you answer **yes** to any question, contact the Board **before** submitting application.*

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? 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

To work as a preparer, you must be supervised by a licensed tax consultant, CPA, PA, or attorney per ORS 673.615(2).

4 EDUCATION

Attach Basic 80-Hour Course certificate to this application.

5 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: _____

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 Tax Board's Web site at: http://www.oregon.gov/OBTP/Forms.shtml.

a) ☐ Preparer License Only (LTP) ~ $60 **b) ☐ Combo LTP License/Tax Business Registration ~ $110**

TOTAL FEES: $_____

7

CHECK OR MONEY ORDER

Mail to:

STATE BOARD OF TAX PRACTITIONERS
3218 Pringle Rd SE, Ste 250
Salem, OR 97302

CREDIT CARD PAYMENT

3218 Pringle Rd SE, Ste 250, Salem, OR 97302

or **FAX (503) 585-5797** **Exp: ____/ ____**

NUMBER _____-_____-_____-_____

BILLING ADDRESS_____

BILLING ZIP CODE _____

VISA MasterCard DISCOVER NETWORK

Updated 11/29/2018

PLEASE READ INSTRUCTIONS ON BACK OF THIS PAGE

IMPORTANT INFORMATION FOR NEW TAX PREPARERS

A) TO RECEIVE YOUR PREPARER LICENSE:

1. Complete the form on the other side of this page.

2. Return this completed form, a copy of your Basic **80-Hour Course certificate** (retain original for your records), 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 issued 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 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. All tax preparer licenses expire September 30.

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 at 503-378-4034 or tax.bd@oregon.gov.

CONTACT INFORMATION

Please inform the Board office immediately regarding *any* change to your contact information, including 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.

OAR 800-010-0041 requires licensees to notify the Board within 15 days of any change in contact information.