

SLIDE 1 - Taxpayer Centric Service Goal Update

SLIDE 2 - FTB Strategic Plan

SLIDE 3 - Personal Income Tax: e-Activity

SLIDE 4 - Taxpayer Centric Focus

- 1993 > Electronic Funds Transfer
- 1999 > Check Refund Status
- 2002 > MyFTB Account
 - Update Account Information
 - View Account Information
- 2002 > Web Pay
- 2002 > Online Installment Agreement Request
- 2003 > CalFile

SLIDE 5 - Taxpayer Centric Focus (continued)

- 2007 > ReadyReturn
- 2010 > Virtual Hold
- 2011 > Live Chat
- 2011 > ftb.ca.gov Redesign
- 2012 > Entity Status Letter

SLIDE 6 - What's Next?

- 1 > Improved Mobile Website Apps
- 2 > New MyFTB Account
 - New online access to:
 - All information from MyFTB Account
 - Tax Returns
 - Notices and Correspondence
 - Taxpayer Alerts
 - Authenticated Chat and Messaging
 - Online Protest Functionality
- 3 > Automated Bill Delay
- 4 > Automated Skip Installment Agreement Payment

SLIDE 7 - What's Next for Tax Practitioners?

1 > Ask an Attorney

2 > Partnering with the Public on Tax Matters

3 > Innocent Joint Filer Relief Brochure

4 > Resources on FTB Website

FTB Legal Documents

- Legal Rulings
- FTB Notices
- Redacted Copies of:
 - Technical Advice Memoranda
 - Chief Counsel Rulings
 - Information Letters

Recent Legislation

- Tax Issues
- Interested Party Meetings
 - Public comments, input, and feedback

5 > Tax Law Presentations

Silicon Valley Summit

Tax Executive Institute

Council of State Taxation (COST)

Various Bar Associations including:

- State Bar Taxation Section
- Sacramento County
- Los Angeles County
- Board of Equalization/Tax Professional Development Seminar

6 > Specialized Services for Tax Professionals

Client List

POA Access

Taxpayer Notifications

SLIDE 8 - Questions?

Taxpayer Centric Service Goal Update



State of California
Franchise Tax Board



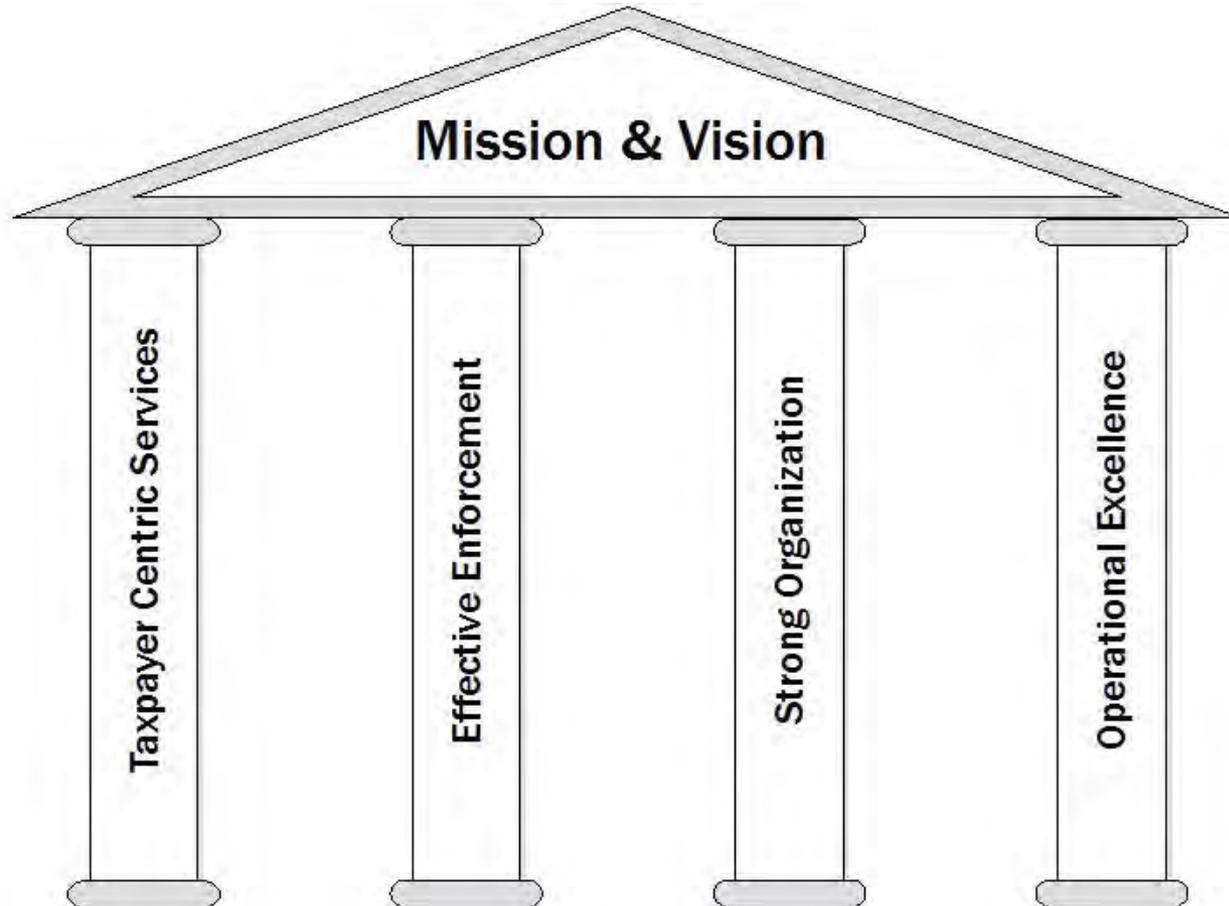
Allen Wilson
Filing Division

Janelyn Nelson
*Accounts Receivable
Management Division*

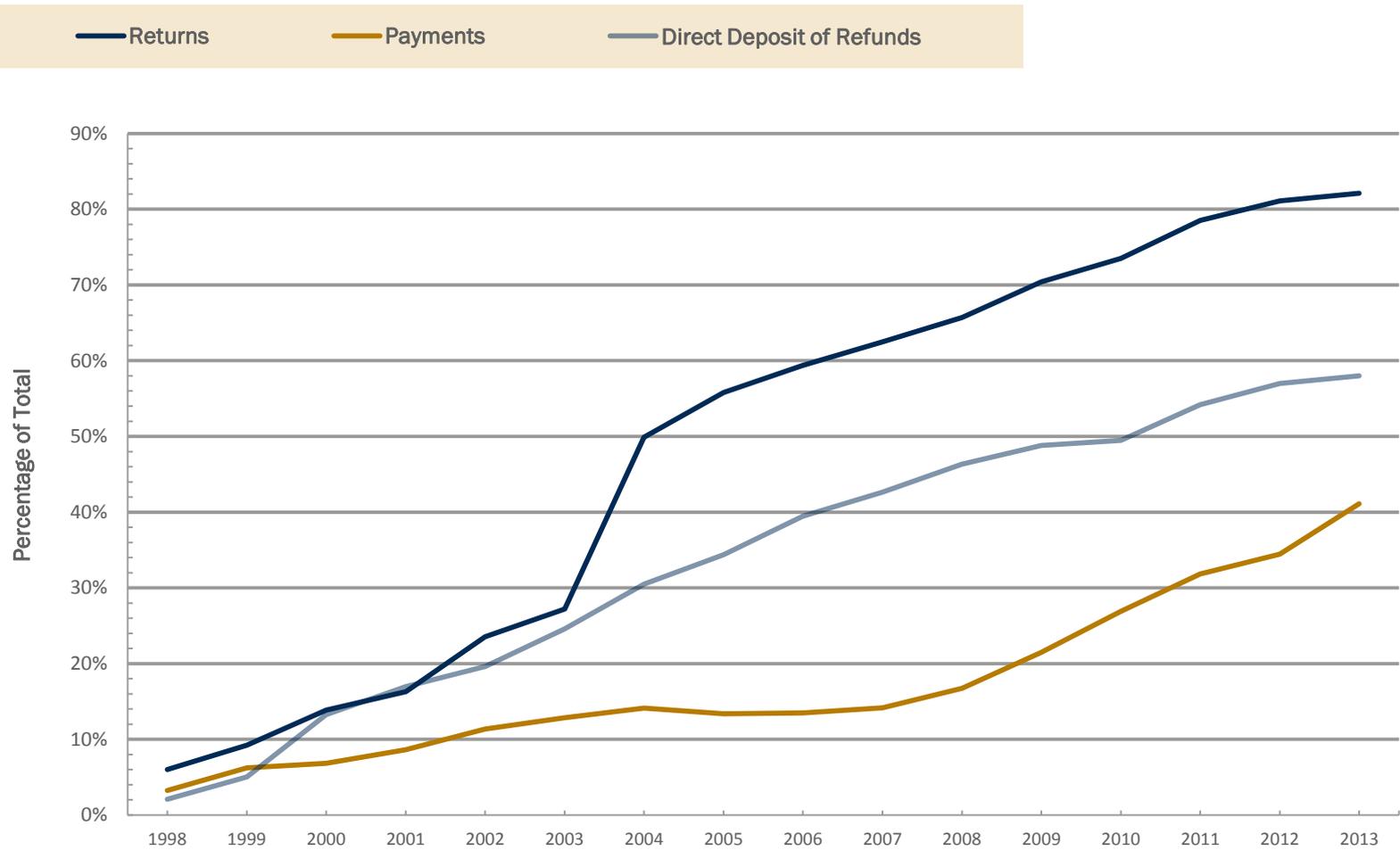
FTB Board Meeting
September 30, 2014



FTB Strategic Plan



Personal Income Tax: e-Activity



Taxpayer Centric Focus

1993

**Electronic Funds
Transfer**

2002

MyFTB Account

2002

**Online Installment
Agreement Request**

1999

**Check Refund
Status**

2002

Web Pay

2003

CalFile

Taxpayer Centric Focus (continued)

2007 → **ReadyReturn**

2011 → **Live Chat**

2012 → **Entity Status Letter**

2010 → **Virtual Hold**

2011 → **ftb.ca.gov Redesign**

What's Next?

1

**Improved Mobile
Website and Apps**

3

**Automated
Bill Delay**

2

**New MyFTB
Account**

4

**Automated
Skip Installment
Agreement
Payment**

What's Next for Tax Practitioners?

1 → **Ask an Attorney**

3 → **Innocent Joint Filer Relief Brochure**

5 → **Tax Law Presentations**

2 → **Partnering with the Public on Tax Matters**

4 → **Resources on FTB Website**

6 → **Specialized Services for Tax Professionals**

Questions?