STATE OF CALIFORNIA
Franchise Tax Board

MyFTB

Tax Professional: Power of Attorney (POA) Declaration – Maintain Associates List

MyFTB allows you to create and maintain an **Associates List** of professional individuals that you can add as additional representatives on POA declarations. You can auto populate your new and existing POA declarations with associates you add to your list. You can view, add, modify, and remove associates from your list.

Important Note: **Changes you make to your Associates List do not update your active POA declarations.**

For information about other actions you can take related to active POA declarations, refer to:

- Power of Attorney (POA) Declaration – Add or Edit Representative's Email Address
- Power of Attorney (POA) Declaration – Add Representative
- Power of Attorney (POA) Declaration – Remove Representative
- Power of Attorney (POA) Declaration – Revoke POA Declaration

To maintain your Associates List:

- Log in to your MyFTB Tax Professional account.
    - Once you're logged into MyFTB, if you need help with the page you're on, select the question mark icon "?" in the upper right corner of that page.
- From your **Tax Professional Overview** page select:
        - **Maintain Associates List** from the **Profile** dropdown menu to view your **Associates List**.
- Follow the steps below.

Steps

Step 1: Choose Action to Maintain Your Associates List

You can choose to view, add, modify, or remove an associate on the **Associates List** page.

Note: To locate a specific associate on your list, select the **Show Filter** link to display the filter boxes at the top of each table column.

Choose one of the following actions to maintain your **Associates List**:

- Select the **Last Name** link in the **Last Name** column to view additional information about your associate.
    - Select the **Back to Associates List** link to return to your **Associates List** page.
    - Select the **Update Associate Information** button to modify your associate's contact information.
        - Skip to Step 3.

  Note: You can select the **Add to POA Declarations** button (must be authorized to add representatives) or **Remove from POA Declarations** button (this button only displays if you added this associate to a POA declaration you submitted on MyFTB) to add or remove this associate on one or more active POA declarations. To remove the associate you must both be representatives on the POA declaration.
- Select the **Add Associate** button to add a new associate to your **Associates List**.
    - Continue to Step 2.

  Note: You can add up to 50 associates. If you reach the maximum number of associates allowed, you must remove an associate before you add another.
- Select the **Update** link in the **Action** column to update your associate's contact information.
    - Skip to Step 3.

  Note: You **cannot** update previously provided name or ID numbers for your associate. You must remove the associate from your list and add them again. To remove this associate, select the **Cancel** button and select the **Remove** link in the **Action** column.
    - Skip to Step 4
- Select the **Remove** link in the **Action** column to remove an associate from your **Associates List**.
    - Skip to Step 4.

Step 2: Enter Associate Information

- Enter the contact and ID information for the new associate you want to add.

  Note: Fields with a red asterisk (*) next to them are required and must be filled in.
- Select the **Add** button.
    - Skip to Step 5.

Note: If the **Confirm Address** window displays, verify the address you entered is correct. If correct, select the **Yes** button. If incorrect, select the **No** button and update the incorrect information.

Step 3: Enter the Updated information

- Enter your associates updated contact information in the applicable fields on the **Update Associate** page.

  Note: Fields with a red asterisk (*) next to them are required and must be filled in.

- Select the **Update** button.
  - Skip to Step 5.

  Note: If the **Confirm Address** window displays, verify the address you entered is correct. If correct, select the **Yes** button. If incorrect, select the **No** button and update the incorrect information.

Step 4: Confirm to Remove Associate

- Select the **Yes** button on the **Remove Associate from Associates List** page to remove this associate from your **Associates List**.
  - Continue to Step 5.

Note: This **only** removes the associate from your **Associates List**. To remove this associate from a POA declaration, refer to Power of Attorney (POA) Declaration – Remove Representative.

Step 5: Confirmation Your Changes Saved

- The **Changes Saved** confirmation message displays at top of the **Associates List** page.
- The saved associate will display on your **Associates List**.
- To leave this page, from your **Main Navigation Menu**, select:
  - **Home** to navigate to your **Tax Professional Overview** page.
  - **Client List** to navigate to your **Client List** page to select another client, add a TIA client, or file a POA declaration.
  - **Client Notices** to navigate to your **Client Notices** page to view notices and messages your POA clients.
  - Option from the **Services** dropdown menu.
  - Option from the **Profile** dropdown menu.