Tax Professional: Power of Attorney (POA) Declaration – Remove Representative

MyFTB allows you to remove yourself or another representative from your active POA declarations. If there is **only one representative** on the POA declaration, **you must revoke** the POA declaration, refer to Power of Attorney (POA) Declaration – Revoke POA Declaration.

For information about other actions related to POA declarations, refer to:

- Power of Attorney (POA) Declaration - Add Representative
- Power of Attorney (POA) Declaration - Add or Edit a Representative's Email Address
- Power of Attorney (POA) Declaration – Maintain Associates List

To remove yourself or another representative from an active POA declaration:

- 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.
- View your **Client List.**
  - From your **Tax Professional Overview** page select:
    - **Client List** from your **Main Navigation Menu**, or
    - The **View Client List** link in your **Quick Links** section.
- Search for your client whose POA declaration you want to edit, refer to Client List – Search for Client.
- Follow the steps below.

Steps

Step 1: View POA Declaration(s)

The **Client List** page allows you to view and manage your clients. You can view your client's online account and manage your client relationships.

Note: Fiduciary (Estate or Trust) and 540NR Nonresident Group Return client accounts are **not available online**. These clients **will display on your Client List** to allow you to manage the relationship.

- Select the **View Details** link, in the **Actions** column, of your **Client List**, for the POA client whose POA declaration you to want to remove yourself or another representative(s) from.

Last Name	First Name	SSN/ITIN	Relationship Type	Online Access	Expiration Date	Actions
Wood	Holly	XXX-XX-2222	POA	Limited	04/11/2025	View Details

Step 2: Select POA Declaration to Remove Representative(s) From

The **Taxpayer Relationship Detail** page displays **all POA and TIA relationships** you have with this client.

- Select the **View POA Detail** link, in the **Actions** column, of the **Power of Attorney (POA) Relationships with** section, for the active POA declaration you want to update.

Status Date	Status	Declaration #	Tax Year	Expiration Date	Actions
12/20/2017	Active	0000000	All	12/20/2023	View POA Detail

Step 3: Manage Representative Information

The **Power of Attorney Detail** page allows you to review and edit POA declaration information. Actions available depend on the status of the POA declaration. To view a list of statuses and actions available, select the question mark icon "?" in the upper right corner of this page.

- Select the **Manage Representatives** link, in the **Representative Information** section, to view a list of **all active representatives** on this POA declaration.

Manage Representatives

Step 4: Remove Representative(s) from POA Declaration

The **POA Representative List** page includes all active and pending representatives for this POA declaration.

- Select the **Remove** link, in the **Action** column, for the representative(s) you want to delete from this POA declaration.

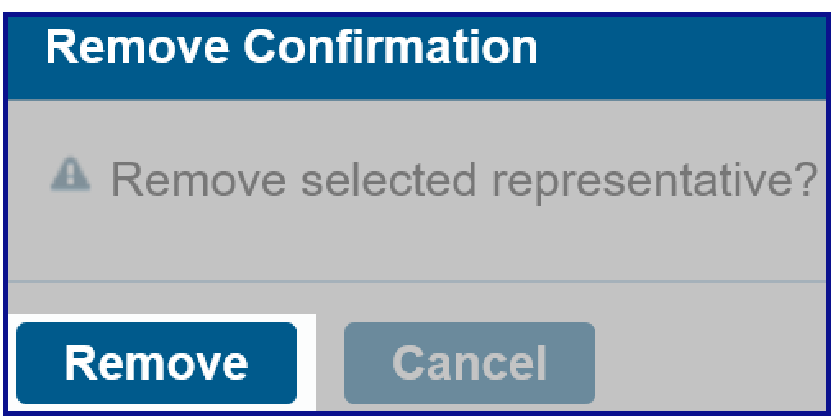
Note: If the representative being removed is the "Primary" representative, you **must designate another representative as the "Primary"** first. We will notify your client of this change. If there is **only one representative listed** on the POA declaration, **you must revoke** this POA declaration.

Primary	Last Name	First Name	ID Number	Action
☑	Case	Justin	P11111111	Edit | Remove
☐	Gold	Mary	P22222222	Edit | Remove

Step 5: Confirm to Remove Representative

- Select the **Remove** button in the **Remove Confirmation** pop-up window to confirm you want to remove this representative from this POA declaration.

Note: You will be navigated to the **POA Representative List** page to view the changes. A **Record successfully removed** confirmation message displays at the top of the **POA Representative List** page.



Step 6: View Confirmation Message

- View the **Confirmation Message** displayed at the top of the **POA Representative List** page.
  - ➢ **Record successfully removed** displays if the selected representative was successfully deleted from this POA declaration.

Step 7: Save Your Changes

- Select the **Save** button on the **POA Representative List** page to save your changes on this POA declaration.

Note: The selected representative(s) are **only removed** from this POA declaration.

Step 8: View Your POA Representative Updates

The **Power of Attorney Detail** page allows you to view the changes you made on this POA declaration. The **Representative Information** section displays **all active representatives** listed on this POA declaration.

The table in the **Representative Information** section displays the updates you made to the representative(s) on this POA declaration.

Primary	Last Name	First Name	Email Address
✓	Gold	Mary	Mar_E_Gold@MGLD.com

- To return to the **Taxpayer Relationship Detail** page to view all your POA and TIA relationships with this client, select the **Back to previous page** link.

- To navigate to your **Client List** page, select **Client List** from the **Main Navigation Menu**.

- To navigate to your **Tax Professional Overview** page, select **Home** from the **Main Navigation Menu**.