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 want to remove yourself or another representative(s) from.

```
<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>SSN/ITIN</th>
<th>Relationship Type</th>
<th>Online Access</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wood</td>
<td>Holly</td>
<td>XXX-XX-2222</td>
<td>POA</td>
<td>Limited</td>
<td>04/11/2025</td>
</tr>
</tbody>
</table>
```

**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.

```
<table>
<thead>
<tr>
<th>Status Date</th>
<th>Status</th>
<th>Declaration #</th>
<th>Tax Year</th>
<th>Expiration Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/20/2017</td>
<td>Active</td>
<td>00000000</td>
<td>All</td>
<td>12/20/2023</td>
<td>View POA Detail</td>
</tr>
</tbody>
</table>
```

**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.

<table>
<thead>
<tr>
<th>Primary</th>
<th>Last Name</th>
<th>First Name</th>
<th>ID Number</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>Case</td>
<td>Justin</td>
<td>P11111111</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>Gold</td>
<td>Mary</td>
<td>P22222222</td>
<td>Remove</td>
</tr>
</tbody>
</table>

**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.

### POA Representative List

| Record successfully removed |

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.

### Save | Cancel

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.

<table>
<thead>
<tr>
<th>Primary</th>
<th>Last Name</th>
<th>First Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gold</td>
<td>Mary</td>
<td><a href="mailto:Mar_E_Gold@MGLD.com">Mar_E_Gold@MGLD.com</a></td>
</tr>
</tbody>
</table>

- 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**.

<table>
<thead>
<tr>
<th>Home</th>
<th>Client List</th>
<th>Client Notices</th>
<th>Services</th>
<th>Profile</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
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<th>Client Notices</th>
<th>Services</th>
<th>Profile</th>
</tr>
</thead>
</table>