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

MyFTB allows you to remove yourself or another representative(s) listed on an active POA declaration. To update multiple POA declarations at the same time, from your **Tax Professional Overview** page select:

- The **Update Multiple POA Declarations** link in your **Quick Links** section.
- **Update Multiple POA Declarations** from the **Services** dropdown menu on your **Main Navigation Menu**.

For information on other actions you can take on an active POA declaration, 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 - Revoke POA Declaration

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 Declarations

- 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.

Step 2: Select POA Declaration

- Select the **View POA Detail** link in the **Actions** column on the **Taxpayer Relationship Detail** page to view the POA declaration details.

Step 3: Manage Representative Information

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

Step 4: Remove Representative

- Select the **Remove** link in the **Action** column on the **POA Representative List** page to remove the representative from this POA declaration.

Note: If the representative being removed is the "Primary" representative, you **must designate another representative as the "Primary" first**. If there is only one representative listed on the POA Declaration, **you must revoke** the POA declaration.

Step 5: Confirm to Remove Representative

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

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

Step 6: Save your changes

- Select the **Save** button to save the changes to the POA declaration.

Step 7: View changes in the Representative Information section

- View the changes in the **Representative Information** section on the **Power of Attorney Detail** page.
- 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.