

Video 1

# CTEC REGISTRATION

CTEC Webinar Series  
PDF Version





# Welcome

As we navigate the complexities of tax preparation in California, it's crucial for all tax preparers to understand the importance of being registered with CTEC.

This registration not only signifies compliance with state law, but also represents a commitment to maintaining the highest standards of industry knowledge and professionalism.



# About

CTEC was established by the California State Legislature in 1997 to regulate and register unenrolled tax preparers who are physically doing business in California.

Most notably, the regulation exempts California licensed \*certified public accounts (CPAs), \*attorneys, and IRS enrolled agents (EAs).

Anyone who is not one of those three, must become a CTEC Registered Tax Preparer (CRTTP).

*\*CPAs must be licensed with the California Board of Accountancy and attorneys must be members with the California State Bar.*



# About

The Council oversees the registration, bonding, and education requirements for CRTPs.

CTEC also approves and monitors education providers to ensure the quality of courses CRTPs must take.





# About

The Council is made up of professionals from the tax preparation industry as specified by the California Business and Professions Code Sections shown below.

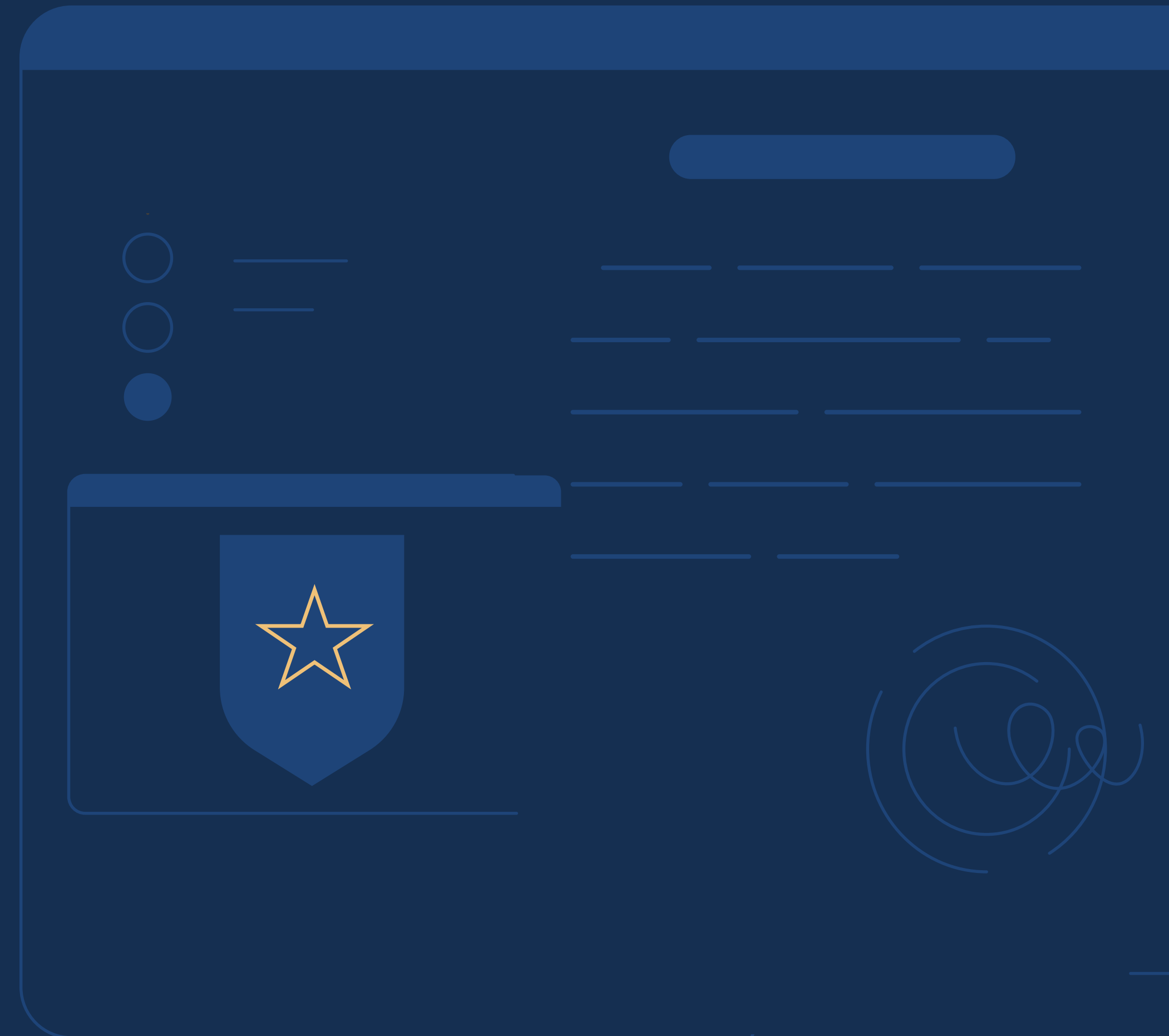
California Business and Professions Code  
Chapter 14 – Tax Preparers [22250 – 22259]



# Initial Registration

Initial requirements include...

- ✓ Complete a live scan and background check
- ✓ Meet 60 hour qualifying education or experience in lieu requirements
- ✓ Obtain an IRS Preparer Tax Identification Number (PTIN)
- ✓ Obtain a \$5,000 surety bond
- ✓ Registration and processing fees will also be applied



# Registration Details

Once all initial requirements are complete, this includes passing a background check, obtaining a bond and PTIN, as well as passing a QE course by at least 70% for each topic (43 hours federal taxation, 15 hours California taxation, 2 hours ethics), you can register through your online account. Search “**apply as a tax preparer**” through the CTEC website.

As part of the process, an account will be set up on your behalf with steps and information on how to complete your registration.

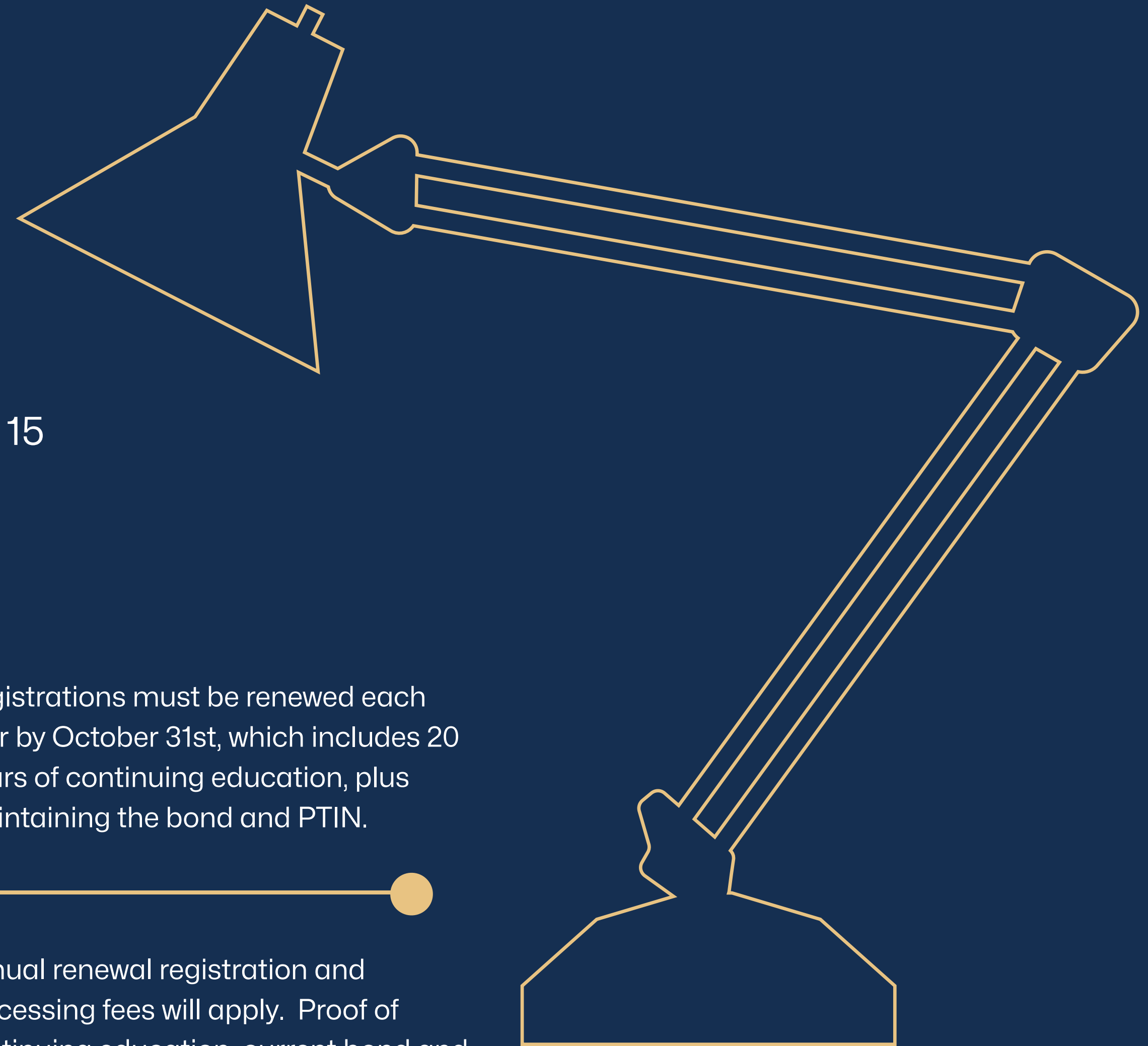
Once initial registration is complete and fees are paid, you are officially **CTEC Registered!**

Registrations must be renewed each year by October 31st, which includes 20 hours of continuing education, plus maintaining the bond and PTIN.

Applicants must register within 18 months from the completion date listed on the 60 hour QE course certificate.

Fees include an initial application fee, registration fee, plus processing fees.

Annual renewal registration and processing fees will apply. Proof of continuing education, current bond and PTIN are required before renewals can be completed.





Please refer to PDF/videos 2 - 5 for additional information about the CTEC program.