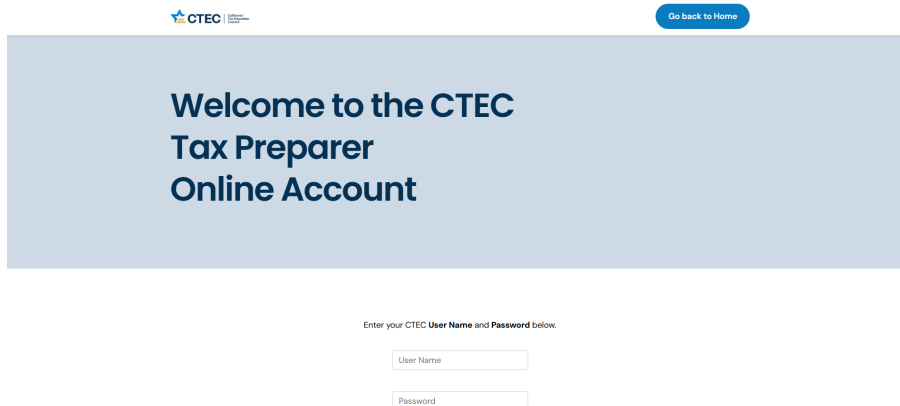


CTEC Registration Renewal Process with Screenshots

1. From the CTEC homepage, click “CRTP Login” OR go to preparer.ctec.org.



2. Login to “Tax Preparer Online Account” with your user name and password.



3. Once logged in, click menu option for “Registration Renewal.”

CTEC Registration Renewal is Now Open! ***Click the Registration Renewal link below for more information***

Your Information
View and update address, email, phone, FTA, and other personal information on file with CTEC.

Your Bond
View and update your bond information or upload a new bond.

Registration Renewal
Registration Renewal information and steps. Listing of education available and education still needed for next renewal cycle and Link to renewal process.

Your Education
View a listing of all education that has been reported by CTEC Providers.

Completed Registrations
View a listing of all historical registrations you have completed and what education was used for each.

Paid Bond Claims
Report and manage any Paid Bond Claims you have had.

CTEC Logo Slides
View and Download CTEC Logo Slides.

Login and Security
Update User Name, Change your password or e-mail address and cell-phone number used for Multi-Factor Authentication Codes.

4. If the education has not yet been reported, this is what you will see:

Registration Renewal

[Return to Main Menu](#)

Education Still Needed For 2025/2026 Renewal Cycle!

Education Reported and Available for – 2025/2026 Renewal Cycle
NOTE: CTEC's cycle year runs from 10/1 to 10/1 of each year. Any additional education completed after 10/1 that was not used towards your renewal will carry over to the next year.

Course Number	State Hours	Ethics Hours	Tax Update Hours	Tax Law Hours	Completion Date
Course Name					
Total Hours Required:	5	2	3	10	
Total Hours Taken:	0	0	0	0*	
Hours Still Needed:	5	2	3	10	

*Any remaining tax update hours will automatically be applied to tax law hours if needed.

5. If all of the education requirements have been completed and reported to your CTEC account, you will see “Education Requirements Have Been Met” at the bottom. A red button will pop up that says “Click Here to Renew Now for 2025/2026.”

Registration Renewal

[Return to Main Menu](#)

[Click Here to Renew Now for 2025/2026](#)

Education Reported and Available for – 2025/2026 Renewal Cycle
NOTE: CTEC's cycle year runs from 10/1 to 10/1 of each year. Any additional education completed after 10/1 that was not used towards your renewal will carry over to the next year.

Course Number	State Hours	Ethics Hours	Tax Update Hours	Tax Law Hours	Completion Date
Course Name					
	0	0	0	10	
	0	0	3	0	
	0	2	0	0	
	5	0	0	0	
Total Hours Required:	5	2	3	10	
Total Hours Taken:	5	2	3	10*	
EDUCATION REQUIREMENTS HAVE BEEN MET	0	0	0	0	

*Any remaining tax update hours will automatically be applied to tax law hours if needed.

6. The first page will show the “Code of Conduct.” You will need to scroll down to the bottom, click the confirmation button to agree, and then continue registration renewal.

Registration Renewal - Code of Conduct

Return to Main Menu

CTEC Preparer Code of Conduct

It is the policy of CTEC for tax preparers (CTEPs) to be aware of the Tax Preparer Code of Conduct and Responsibilities.

Background: In 1988 the California legislature passed the Tax Preparer Act, Business and Professions Code 22320-22328, which regulates tax preparers. These sections of the statute pertain to tax preparer ethics, professional conduct, conduct regarding handling and penalties for breaching the tax preparer statute.

A tax preparer is defined as "a person who, for a fee, assists with or prepares tax returns for another person or who assumes that responsibility for completed work on a return on which preliminary work has been done by another person, or who holds himself or herself out as offering these services."

A tax return is defined as "a return, declaration, statement, refund claim, or other document required to be made or filed in connection with state or federal income taxes or state bank and corporation franchise taxes."

The statute exempts the following:

- An individual with a current valid license issued by the [California Board of Accountancy](#) (and his or her employees while functioning within the scope of his or her employment)
- An individual who is an active member of the State Bar of California (and his or her employees while functioning within the scope of his or her employment)
- Non-employees of a trust company or business as defined in the statute, a financial institution and employees thereof who are regulated as defined in the statute
- Licensed Agents (and their employees while functioning within the scope of their employment)

CTEC Registered Tax Preparers (CTRTPs):

Must register as a tax preparer with the California Tax Education Council (CTEC).

Must maintain a \$10,000 tax preparer bond (required by a surety company admitted to do business in California. A tax preparer shall provide to the surety company proof that he or she is at least 18 years of age before a bond can be issued.

Must identify to the surety company preparers employed or associated with the tax preparer securing the bond. Must file an amendment to the bond within 30 days of any change in the information provided to the bond.

Must not conduct business without having a current surety bond in effect.

Must cease doing business as a tax preparer upon cancellation or termination of bond until a new bond is obtained.

Must furnish evidence of a current bond upon the request of any state or federal agency or tax enforcement agency.

Must prior to rendering any tax preparation services, provide the customer, in writing, with the tax preparer's name, address, telephone number, evidence of compliance with the bonding requirement (including the name of your bond company and the bond policy number) and the address of the CTEC website where filing.

Must not make fraudulent, untrue, or misleading statements or representations that are intended to induce a person to use their tax preparation services.

Must not obtain the signature of a customer on a tax return or authorizing document that contains blank spaces to be filled in after it has been signed.

Must not fail or refuse to give a customer a copy of any document requiring the customer's signature, within a reasonable time after the customer signs.

Must not fail to maintain a copy of any tax return prepared for a customer for four years from the later of the due date of the return or the completion date of the return.

Must not engage in advertising practices that are fraudulent, untrue, or misleading, including assertions that the tax preparer bond in any way implies licensure or endorsement of tax preparer by the State of California.

Must not violate provisions of Section 25303 or 25612 of the United States Code prohibiting tax preparers from disclosing any information obtained in the business of preparing federal or state income tax returns unless (1) consented to in writing by the taxpayer in a separate document; (2) expressly authorized by law; (3) necessary for the preparation of the return; and (4) pursuant to court order.

Must not fail to sign a customer's tax return when payment for services rendered has been made.

Must not fail to return, upon demand by or on behalf of a customer, records or other data provided to the tax preparer by the customer.

Must not give false or misleading bond information to a consumer or give false or misleading information to a surety company in obtaining their tax preparer bond.

Must apply for their Certificate of Completion within 18 months after completing their 60 hours of qualifying education from an approved provider.

Must complete, on an annual basis, not less than 20 hours of continuing education from an approved curriculum provider (20 hours federal tax law, 3 hours ethics, 3 hours federal tax updates and 13 hours California).

According to California Business & Professions Code Section 22323.1, and California Revenue & Taxation Code Section 19811 when a person prepares a tax return for a fee without the appropriate bond designation (the Franchise Tax Board pursuant to an agreement with the California Tax Education Council will do this) the amount of the penalty under the subdivision for the first failure to register is two thousand five hundred dollars (\$2,500). This penalty shall be waived if proof of registration is provided to the Franchise Tax Board within 90 days from the date of notice of the penalty which is mailed to the tax preparer. (2) The amount of the penalty for a failure to register, other than the first failure to register, is five thousand dollars (\$5,000).

Violators of other sections of the statute are guilty of a misdemeanor, which offense is punishable by a fine not exceeding \$10,000 or the imprisonment in a county jail for not more than one year, or by both. If a CTEP fails to perform a duty specifically imposed upon him or her pursuant to this statute, any person may maintain an action for enforcement of those duties or to recover a civil penalty in the amount of \$10,000 or less for both enforcement and recovery.

The Superior Court, in and for the county in which any person acts as a tax preparer in violation of the provisions of this statute, may upon a petition by any person, issue an injunction or other appropriate order restraining the conduct.

Click the confirmation box below to continue registration.

☒ I have read and agree to abide by the Tax Preparer Code of Conduct and Responsibilities.

Continue Registration Renewal

7. The next page will ask you to verify if you’re personal information is correct. If everything is correct, click the confirmation button. If not, you can click “Update Your Information” to make changes.

Registration Renewal - Information

[Return to Main Menu](#)

STEP 1 - VERIFY PERSONAL INFORMATION IS CORRECT

Review your information and click the "Update Your Information" button below if you need to make any changes. If your information is correct click "Information is Correct - Continue Renewal" to continue renewal process.

PTIN: DBA/Doing Business As): Bus. Phone: Res. Phone: Email: Secondary Email: DOB:	Mailing Address: Country: Physical Address: Country:
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CTEC Renewal Notice:
CTEC Exclude From Mailing List:

Click the confirmation box below to continue registration.

☒ I have filed or will be filing my personal and/or business tax returns for the past three years with the appropriate agencies (IRS and FTB).

[Update Your Information](#) [Information is Correct - Continue Renewal](#)

STEP 2 - VERIFY BOND INFORMATION IS CORRECT

STEP 3 - REGISTRATION RENEWAL PAYMENT

8. The next page will verify if you're bond information is correct. If the bond is expired, it will prompt you to upload a new bond.

Registration Renewal - Bond Information

[Return to Main Menu](#)

STEP 1 - VERIFY PERSONAL INFORMATION IS CORRECT

STEP 2 - VERIFY BOND INFORMATION IS CORRECT

Update your bond information below as needed and then click the "Update Your Bond Information" button. You must upload a new copy of your bond certificate when making changes to your bond information.
*required fields

Bond Company Name *	Bond Policy Number *
<input type="text"/>	<input type="text"/>
Bond Effective Date *	Bond Expiration Date *
<input type="text"/>	<input type="text"/>

Upload a New Bond File - This will replace the current bond file. *

[Choose File](#) [No file chosen](#)

[Cancel](#) [Update Your Bond Information](#)

Click here for instructions on how to scan and upload your Bond Certificate.

STEP 3 - REGISTRATION RENEWAL PAYMENT

9. If the bond is current, verify the bond is correct and continue...

Registration Renewal - Bond Information

[Return to Main Menu](#)

STEP 1 - VERIFY PERSONAL INFORMATION IS CORRECT

STEP 2 - VERIFY BOND INFORMATION IS CORRECT

Review your information and click the "Update Your Bond Information" button if you need to make any changes. If your information is correct click "Information is Correct - Continue Renewal" to continue renewal process.

Bond Company:
Bond Number:
Bond Effective Date:
Bond Expiration Date:

Bond File Uploaded:

[Update Your Bond Information](#) [Information is Correct - Continue Renewal](#)

STEP 3 - REGISTRATION RENEWAL PAYMENT

10. The next page is the “Registration Renewal Payment.” Enter your payment information and then submit payment to process the renewal.

Registration Renewal – Payment

[Return to Main Menu](#)

STEP 1 – VERIFY PERSONAL INFORMATION IS CORRECT

STEP 2 – VERIFY BOND INFORMATION IS CORRECT

STEP 3 – REGISTRATION RENEWAL PAYMENT

Registration Renewal Details	Payment Information
Registration Date: 9/12/2025 Registration Cycle: 2025/2026 Registration Type: Renewal Registration Fee: \$33.00 Processing Fee: \$2.00 Late Fee: \$0.00 Total Amount to be Charged: \$35.00	Credit Card Number <input type="text"/> Expiration Date select month / select year CVV (3 digits on back of card) <input type="text"/>

[Submit Payment and Process Renewal](#)

11. If successful, you will receive a confirmation page for your records.

Registration Receipt

[Return to Main Menu](#)

CTEC Preparer Registration Receipt

CTEC REGISTRATION FOR:	2025/2026
Name:	
CTEC ID:	
Credit Card Charged:	
Amount:	\$35.00
Transaction #:	
Date:	

CTEC Preparer Registration Verification

Educational Requirement Met: YES
Registration Fees Paid: YES

CTEC Status:
You are a valid CTEC Preparer and registered to prepare taxes from November 1, 2025 through October 31, 2026.

[Return to Completed Registrations](#) [Print Verification/Receipt](#)