



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

Last Name ^	First Name ^	SSN/TIN	Relationship Type ^	Online Access ^	Expiration Date ^	Actions ^
Wood	Holly	XXX-XX-2222	POA	Limited	04/11/2025	<a href="#">View Details</a>

### 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	<a href="#">View POA Detail</a>

### 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	
<input checked="" type="checkbox"/>	Case	Justin	P111111111	<a href="#">Edit</a>	<a href="#">Remove</a>
<input type="checkbox"/>	Gold	Mary	P222222222	<a href="#">Edit</a>	<a href="#">Remove</a>

## 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.

### Remove Confirmation

Remove selected representative?

Remove

Cancel

## 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 ⚡
<input checked="" type="checkbox"/>	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**.

