

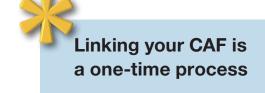
Tax professionals: How to manage authorizations using Tax Pro Account

Submit Powers of Attorney (POA) or Tax Information Authorization (TIA)

- 1. Enter tax professional's and taxpayer's details
 - Professional's details: name, address, Centralized Authorization File (CAF) number
 - Taxpayer's details: name, address, tax identification number (TIN)
- 2. Select tax matter(s) and period(s)
- 3. For POA: Check box as electronic signature and submit for validation
- 4. Optional: Inform taxpayer to approve the request in their Online Account

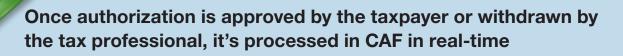
Link your Centralized Authorization File (CAF) number

- 1. Select Link a CAF number from your profile
- 2. Follow the 2-step process to request a PIN and then enter your PIN. Allow 1-2 weeks for the PIN to arrive to the address registered on CAF.



View or withdraw active POA/TIA authorizations

- 1. Select a taxpayer in the Taxpayers tab
- 2. Click Authorizations to view active authorizations, regardless of how they were submitted
- 3. View authorization details or click withdraw



Considerations for taxpayers and tax professionals

- Names and addresses must match IRS records exactly
- Must have an address in the United States or the District of Columbia
- POA can be initiated by attorneys, CPAs, enrolled agents, enrolled actuary and retirement plan agents. TIA can be initiated by anyone with a valid CAF number.