



# PTIN Application Checklist: What you need to get started

Before you begin your PTIN application, be sure you have the following available:

- Social Security number
- Personal information (name, mailing address, date of birth)
- Business information (name, mailing address, telephone number)
- Previous year's individual tax return (name, address, filing status) <sup>1</sup>
- Explanations for felony convictions (if any) <sup>2</sup>
- Explanations for problems with your U.S. individual or business tax obligations (if any) <sup>2</sup>
- Credit/Debit/ATM card for the \$19.75 PTIN user fee. The user fee is **non-refundable**.
- If applicable, any U.S.-based professional certification information (CPA, attorney, enrolled agent, enrolled retirement plan agent, enrolled actuary, certified acceptance agent, or state license) including certification number, jurisdiction of issuance, and expiration date

Once you gather all of your information, just follow these easy steps to obtain your PTIN:

- **Create Your Account** – First, you must create an account by providing your name and email address. The system will then email your temporary password, which you will change when you go back to enter your information in the PTIN application.
- **Apply for Your PTIN** – You will complete the online application by providing personal information, information about your previous year's tax return, professional credentials, and more.
- **Pay Your Fee** – The application will transfer you to our partner bank where you will make your payment of \$19.75 by credit/debit/ATM card or eCheck.
- **Get Your PTIN** – After completion of the online application, your PTIN is provided online.

**Note:** Most PTIN correspondence is delivered through secure online messaging in your PTIN account. Use your most up-to-date personal email address when obtaining your PTIN to ensure that you receive our messages. Remember, PTINs belong to the individual, not the business or firm.

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<sup>1</sup> Tax return information is required to authenticate your identity. If you filed your tax return in the past 8 weeks, please use a previous year's individual tax return.

<sup>2</sup> Felony convictions and discrepancies with your federal tax obligations may affect your ability to obtain a PTIN.

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