



CTEC E-MAIL AND MAILING LISTS

Background: CTEC sets tax education standards for CTEC education providers. The law requires non-exempt tax preparers to meet certain educational requirements in order to legally practice tax preparation for a fee within California. To facilitate the dissemination of educational opportunities available to preparers, CTEC will make its registered preparer list available for commercial use.

Mailing List Contents: The California Tax Education Council mailing list contains the current names and addresses of CTEC Registered Tax Preparers and is updated on a regular basis. Registered tax preparers can, upon registration, elect to have their names excluded from the mailing list.

E-Mail List Contents: The California Tax Education Council e-mail list contains the current names and e-mail addresses for CTEC Registered Tax Preparers and is updated on a daily basis. CRTPs can, upon registration, elect to have their names excluded from the mailing list.

Limitations on Sale: CTEC reserves the right to refuse to sell the list for a use that CTEC considers unsuitable.

Distribution Media: Names will be provided on compact disk and can be opened in Excel. If requested by purchaser, the list can also be sent via e-mail. Information provided is limited to the name, address, e-mail address and CTEC number. Names will be provided in CTEC registration number order and can be sorted by any field.

Conditions of Sale:

1. The list may be used as many times as the purchaser sees fit. If, however, the list is being resold, the re-purchaser must be notified, in writing, of the date the list was last accurate.
2. Payment can be made by cashier's check, money order, or credit card. Orders must be prepaid.
3. Cost of the list is \$250, plus tax; however, this price may change from time to time. (Reference: CTEC Policy BF04 – Fees).
4. List will not be shipped until payment has been received.
5. There are no refunds once the list has been shipped.

Approved December 13, 1999
CTEC Board of Directors

Responsibility: Staff