



## SENIOR PROPERTY TAX CONSULTANT REGISTRATION APPLICATION INSTRUCTIONS

The application must be completed and signed by the applicant. An application is not considered complete and will not be processed until all required items have been submitted. All information provided must be typed or printed in **black ink**. Attachments must be submitted on separate pieces of single-sided, 8½" x 11" paper. Use a paperclip to fasten all pages together, with the check or money order on top. **Do not use staples.**

### DOCUMENTS SUBMITTED WITH YOUR APPLICATION WILL NOT BE RETURNED. KEEP A COPY OF YOUR COMPLETED APPLICATION, ALL ATTACHMENTS, AND YOUR CHECK OR MONEY ORDER.

1. **NAME** – Write your legal name in the spaces provided. (Last, First, Middle Name, Suffix) Examples of a suffix include Jr., Sr., and II. (Mr. is not a suffix.)
2. **DATE OF BIRTH** – Write your birthdate. You must be at least 18 years of age.
3. **GENDER** – Select whether you are male or female.
4. **SOCIAL SECURITY NUMBER** – Social Security number disclosure is required by Section 231.302(1) of the Texas Family Code in order to obtain a license. Your social security number is subject to disclosure to an agency authorized to assist in the collection of child support payments. For more information regarding child support payments, contact the Texas Attorney General at:

www.oag.state.tx.us/child/index or call (512) 460-6000 or (800) 252-8014.

5. **MAILING ADDRESS** – Write your current mailing address. This is the address where we will send you mail. A post office box can be used as a mailing address. You can add the zip plus-4 to help the postal service deliver mail more efficiently and accurately.
6. **PHONE NUMBER** -- Write a telephone number, including the area code, where we can reach you during the day. This may be your office phone number where we can leave a message.
7. **EMAIL ADDRESS** – Write your email address. Please provide your email address so the department may email license information and required notices to you. Your email address is confidential pursuant to the Texas Public Information Act, and the department will not share it with the public.
8. **CRIMINAL HISTORY** – Indicate if you have ever been convicted of, or placed on deferred adjudication for, any misdemeanor or felony, other than a minor traffic violation. If YES, complete and attach a Criminal History Questionnaire for each offense. This form can be obtained from the TDLR website at [www.tdlr.texas.gov/MISC/lic002.pdf](http://www.tdlr.texas.gov/MISC/lic002.pdf)

If you are worried your criminal history could prevent you from getting this license, Texas allows you to have your criminal history evaluated before submitting your application and non-refundable fees. To request a criminal history evaluation, submit a Criminal History Evaluation Letter, a completed Criminal History Questionnaire form for each crime you were convicted of, or placed on deferred adjudication for, and a \$25 fee. You can find more information on the process and download the necessary forms on the TDLR website at [www.tdlr.texas.gov/crimHistoryEval.htm](http://www.tdlr.texas.gov/crimHistoryEval.htm)

9. **DISCIPLINARY ACTION HISTORY** – Indicate if you have ever had an occupational license, certification, or registration suspended, revoked, or denied in any state. If you have, complete and attach a Disciplinary Action Questionnaire for each disciplinary action. This form can be obtained from the TDLR website at: [www.tdlr.texas.gov/misc/Disciplinary Action Questionnaire.pdf](http://www.tdlr.texas.gov/misc/Disciplinary Action Questionnaire.pdf)
10. **DESIGNATE YOUR RESIDENT TEXAS AGENT** - If your place of business is not in Texas, you must provide the name, and requested contact information of a resident Texas agent for the purpose of service of process.
11. **BUSINESS NAME** - Write the name of your business and requested business contact information.
12. **DID YOU GRADUATE FROM HIGH SCHOOL OR EARN A HIGH SCHOOL EQUIVALENCY** - Check YES or NO to indicate if you graduated from high school or earned a G.E.D. You must have a high school diploma or its equivalent.
13. **DO YOU HOLD AN ACTIVE REAL ESTATE BROKER, REAL ESTATE SALESPERSON, OR REAL ESTATE APPRAISER LICENSE** - Check YES or NO to indicate if you are currently licensed as a real estate broker, salesperson, or appraiser. If YES, provide your real estate license type, number, and expiration date.
14. **HAVE YOU PERFORMED OR SUPERVISED PTC SERVICES FOUR OF THE LAST SEVEN YEARS** - Check YES or NO to indicate if you have performed or supervised PTC services as your primary occupation for four of the last seven years. If YES, attach a resume or letter describing your experience. If NO, you may not be eligible for this license.
15. **DO YOU HOLD THE CMI DESIGNATION** - Check YES or NO to indicate if you are a Certified Member of the Institute (CMI) for Professionals in Taxation. If YES, attach a copy of your CMI designation certificate. As a CMI, you will not be required to take to the senior PTC exam. If NO, you will be required to take the exam once all eligibility requirements have been met.
16. **CREDITS FOR SENIOR PROPERTY TAX CONSULTANT** - Complete this section to determine your total credits you have from PTC experience and higher education.

(a) enter the number of years your primary occupation involved the performance or supervision of PTC services. Subtract five years and enter the results in the space provided. The Department allows a maximum of 10 credits from occupational experience, if your results are greater than 10, enter 10 in the space provided.

(b) Enter the number of years of higher education you have in the provided space. Multiply that number by two and enter the results in the space provided. The Department allows a maximum of six credits from higher education; if your results are greater than six, enter six in the space provided. A year is a minimum of 24 completed semester hours.

(c) If you have completed a Bachelor's Degree, enter four in the space provided, if you have not, enter a zero. Add the total number of credits and enter the total in the space provided. This total and total from your completed PTC educational programs and course must total at least 25.

- You must attach the completion certificate for each PTC related educational program and course.

17. STATEMENT OF APPLICANT - Carefully read the statement of applicant before you sign and date your application.

**APPLICATION INFORMATION FOR MILITARY SERVICE MEMBERS, MILITARY VETERANS AND MILITARY SPOUSES**

The Texas Department of Licensing and Regulation recognizes the contributions of our active duty military service members, their spouses, and veterans. If you want to use one of the licensing options available to military service members, military veterans and military spouses, please complete the **Military Service Member, Military Veteran or Military Spouse Supplemental Application (TDLR form MIL001)** and attach it with your license application. The form is located on the TDLR web-site at: <http://www.tdlr.texas.gov/misc/militarysupplemental.pdf>.

If you have additional questions about qualifications, training or experience requirements relating to occupation licensing for military service members, military veterans or military spouses please go to the TDLR Military Information web page at: <http://www.tdlr.texas.gov/military.htm>.

State law prohibits renewing a license more than once after a licensee has defaulted on a student loan guaranteed by the **Texas Guaranteed Student Loan Corporation (TGSLC)** unless the licensee has entered into a repayment agreement with TGSLC. **YOU SHOULD CONTACT TGSLC BEFORE FILING THIS APPLICATION** if you have defaulted on a student loan. An application or renewal may be rejected if this agency has received information from TGSLC that the applicant has defaulted on a student loan. The Texas Guaranteed Student Loan Corporation can be contacted at: **Texas Guaranteed ATTN: Collections PO Box 83100, Round Rock, TX 78683-3100, Telephone: (800) 222-6297, <http://www.tgslc.org> or email: [cust.assist@tgslc.org](mailto:cust.assist@tgslc.org).**



TEXAS DEPARTMENT OF LICENSING AND REGULATION  
PO Box 12157 ● Austin, Texas 78711-2157  
(800) 803-9202 ● (512) 463-6599 ● FAX (512) 475-2871  
www.tdlr.texas.gov ● cs.property.tax.consultants@tdlr.texas.gov

## PROPERTY TAX CONSULTANTS CODE OF ETHICS

Texas Occupations Code, Chapter 1152 requires that registrants read and submit to a code of ethics. This requirement is part of the Property Tax Consultants registration application.

Rule 66.100 reads as follows:

- (a) A registrant shall not participate, whether individually, or in concert with others, in any plan, scheme, or arrangement attempting or having as its purpose the evasion of any provision of the Act or commission rule.
- (b) A registrant shall not directly or indirectly or in any manner whatsoever lend his/her registration or identification to any person, firm or corporation for the purpose of evading any provision of the Act or commission rule.
- (c) A registrant shall exercise reasonable care and diligence to prevent persons under his/her supervision from engaging in conduct which would violate any provision of the Act or commission rule.
- (d) A registrant shall not engage in any activity that constitutes dishonesty, fraud, or gross incompetence while performing property tax consulting services.
- (e) A registrant shall promptly report to the department any known violation of the Act or commission rule.
- (f) A registrant shall cooperate fully with the department in the investigation of an alleged violation of the Act or commission rule.
- (g) A registrant shall not offer or promise anything of value with the intent of inducing a person who is performing a public duty to perform or fail to perform any act related to such public duty.
- (h) A registrant shall not contract for or accept compensation or anything of value for services not performed.
- (i) A registrant shall not knowingly or intentionally engage in any false or misleading conduct or advertising with respect to client solicitation.
- (j) A registrant shall not knowingly furnish inaccurate, deceitful, or misleading information to a client or employer, a prospective client or employer, or a public agency or representative of a public agency.
- (k) A registrant shall not reveal information known to be confidential unless the release of such information is authorized by the source or required by law.
- (l) A registrant shall not state or imply that the registrant represents a person or firm that the registrant does not in fact represent.
- (m) A registrant shall not solicit or advertise property tax consulting services by claiming a specific result or stating a conclusion regarding such services without prior analysis of the facts and circumstances pertaining thereto.



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**SENIOR PROPERTY TAX CONSULTANT REGISTRATION APPLICATION**

**Do Not Write Above This Line**

MEET ALL REQUIREMENTS WITHIN 12 MONTHS OF THE FILING DATE, OR THE APPLICATION WILL BE TERMINATED.

**APPLICATION FEE: \$75**  
**REGISTRATION FEE: \$40**  
**TOTAL FEE: \$115**  
**(APPLICATION FEE IS NON REFUNDABLE)**

**1. Name:**  
 \_\_\_\_\_  
 Last First Middle Name Suffix (JR, SR, III)

**2. Date of Birth:** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Month Day Year

**3. Gender:**  Male  Female

**4. Social Security Number:**  
 (See instruction sheet for disclosure information) \_\_\_\_\_

**5. Mailing Address:** (Used to receive mail from TDLR) (A PO box is allowed for this address)  
 \_\_\_\_\_

Number, Street Name, Suite Number/Apartment Number  
 \_\_\_\_\_  
 City State Zip Code

**6. Phone Number:** \_\_\_\_\_  
 (Area Code) Phone Number

**7. Email Address:** \_\_\_\_\_  
 (Ex: johndoe@aol.com) See instruction sheet for disclosure information

**8. Have you ever been convicted of, or placed on deferred adjudication for, any felony or misdemeanor, other than a minor traffic violation?** If YES, complete and attach a Criminal History Questionnaire for each offense.  Yes  No  
See instruction sheet for more information

**9. Have you ever had an occupational license, certification or registration suspended, revoked, or denied in any state?**  Yes  No  
 If YES, attach a Disciplinary Action Questionnaire to this application. (This does not include your driver license.)

**BUSINESS INFORMATION**

**10. Designate your resident Texas agent for "service of process" if you DO NOT have a place of business in Texas.** (If you have a place of business in Texas, skip this section and go to section 11.)

**Agent's Name:**  
 \_\_\_\_\_  
 Last First Middle Initial Suffix (JR, SR, III)

**Agent's Mailing Address:** (A PO box is allowed for this address)  
 \_\_\_\_\_

Number, Street Name, Suite Number/Apartment Number  
 \_\_\_\_\_  
 City State Zip Code

**Agent's Phone Number:** \_\_\_\_\_  
 (Area Code) Phone Number

**Agent's Email Address:** \_\_\_\_\_  
 (Ex: johndoe@aol.com) See instruction sheet for disclosure information

**11. Business Name:**

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**Business Physical Address:** (A PO box cannot be used for this address)

Number, Street Name, Suite Number

City County State Zip Code

**Business Phone Number:** \_\_\_\_\_  
 (\_\_\_\_\_) \_\_\_\_\_  
 Area Code Phone Number

**Business Email Address:** \_\_\_\_\_  
 (Ex: johndoe@aol.com) See instruction sheet for disclosure information

**LICENSING REQUIREMENTS**

**12. Did you graduate from high school or earn a high school equivalency certificate (G.E.D.)?**  Yes  No

**13. Do you hold an active real estate broker, real estate salesperson or real estate appraiser license?**  Yes  No

If **YES**, provide the license type: \_\_\_\_\_ License Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

**ATTACHMENTS**

**14. Have you performed or supervised persons in the performance of property tax consulting services as your primary occupation for at least four of the last seven years?**  Yes  No

If YES, attach a resume or letter describing your experience.

**15. Do you hold the Certified Member of the Institute for Professionals in Taxation (CMI) designation?**  Yes  No

If YES, attach a copy of your certificate. (CMI designation satisfies the senior PTC exam requirement)

**16. Credits for Senior Property Tax Consultant:**

You must have a total of 25 credits granted by the Department from educational programs and courses, experience, and higher education

- Attach completion certificates of approved courses and certificates for courses you want evaluated for credit. Department approved courses can be found at: <http://www.tdlr.texas.gov/ptc/ptccreditlist.htm>
- Complete the following to compute credits to be granted by the Department:

List the number of years your primary occupation involved the performance or supervision of property tax consultant services or property appraisal, assessment, or taxation.

(a) Work Experience: Number of Years \_\_\_\_\_ minus first 5 years = \_\_\_\_\_ (10 credit maximum)

(b) Higher Education: Number of Years \_\_\_\_\_ X 2 = \_\_\_\_\_ (6 credit maximum)  
 (One Year = 24 semester hours)

(c) Bachelor's Degree: Yes = 4 credits No = 0 credits \_\_\_\_\_

**TOTAL** \_\_\_\_\_ (add to total of education courses)

**17. STATEMENT OF APPLICANT**

I certify all information submitted on this and attached forms are true and accurate. I authorize TDLR to conduct any investigations of me which it deems prudent. I understand that the information revealed in any investigation may be cause for disapproval of the application even though other requirements for a license have been met. I further certify that I have read the Registration of Property Tax Consultants Act, Occupations Code, Chapter 1152, and the Texas Department of Licensing and Regulation rules promulgated thereunder and will abide by the Code of Ethics, Section 66.100 of those rules.

\_\_\_\_\_ Date Signed \_\_\_\_\_ Signature of Applicant