

Income Tax Preparer Bond Guide

Notice: You must have an active bond to be registered with CTEC.

Our affiliate company *FinanGroup Inc.* (Insurance Lic. # OE75432) can provide your CTEC required Income Tax Preparer Bond, **at a great price!**

The bond prices are exclusive and only for **A & B Office** students. Bond prices already include processing and notarization fees; fees are non-refundable. See www.aboffice.com for pricing and terms.

1-Year Tax Preparer Bond
2-Year Tax Preparer Bond
3-Year Tax Preparer Bond
Call Us For Additional Bond Terms

How To Complete Your New Bond Order:

A.) Fill out the bond application on the next page.

Only complete the following sections: 1. Effective Date 2. Premium Amount

3. Number of Years (Term) 4. Print Your Name 5. Signature 6. Address 7. Phone Number.

B.) Pay for the bond online OR mail a check/money order payable to "FinanGroup Inc."

C.) Return your completed bond application to our office by email, fax, or U.S. mail:

Email: bond@aboffice.com / **Fax:** 818-308-8533

Mail To: **FinanGroup Inc.**
Attn: **Tax Bond Processing**
12432 Oxnard Street
North Hollywood, CA 91606

Note: Please allow 2 - 3 business days for processing from the day your application and payment is received in our office. "Fast Same Day Service" is available M-F before 2:00 PM.

Yes, I want "Fast Same Day Service" an additional fee applies. Please fax or email me the bond:

My Fax Number: (_____) _____ **Email:** _____

Signature: _____ **Date:** _____



RLI Insurance Company
 P.O. Box 3967 Peoria IL 61612-3967
 Phone: 309-692-1000 Fax: 309-692-8637

SURETY BOND OF TAX PREPARER TO THE PEOPLE OF THE STATE OF CALIFORNIA

Bond No _____ Effective Date _____ Premium is _____ for a term of _____ year(s)

KNOW ALL MEN BY THESE PRESENTS

That we _____, as Principal and **RLI Insurance Company** a corporation created, organized and existing under and by virtue of the laws of the State of Illinois, as Surety, are held and firmly bound unto the people of the State of California, for the use and benefit of interested persons, in the total aggregate amount of Five Thousand and No/100's Dollars (\$ 5,000.00) lawful money of the United States of America, for which payment well and truly to be made, we bind ourselves, our heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

The condition of the above obligation is such that:

(1) WHEREAS, The above named Principal is the holder of or the applicant for a validated registration as a Tax Preparer, as defined by the Tax Preparers Act, and is required by the provisions of Section 9891.35 of the Business and Professions Code of the State of California, a part of said Act, to furnish a bond in the sum above named, conditioned as herein set forth.

(2) NOW THEREFORE, If said Principal shall comply with the provisions of the Tax Preparers Act and the rules and regulations thereunder, and all acts amendatory thereof and supplementary hereto, now and hereafter enacted, and if said Principal shall, while acting as a tax preparer, cause no damages to any person by reason of misstatement, misrepresentation, fraud, deceit, or any unlawful acts or omissions of Principal or its agents or employees while acting in the scope of their employment or agency, this obligation shall then and in that event be void; otherwise it shall remain in full force and effect for the period hereinafter set forth. This bond is further subject to the provisions of chapter 1635. Statutes 1982.

This bond is also subject to the following conditions:

1. That any person who sustains damages covered by this bond may, in addition to any other remedy that he may have, bring an action in his own name upon this bond for recovery of such damages.

2. That the total aggregate liability of the Surety or Sureties herein shall be limited to the payment of _____ Dollars (\$ 5,000.00).

3. That the Surety or Sureties may cancel this bond and be relieved of further liability hereunder by delivering 30 days written notice to the Principal at his address last known to the Surety and to Chief of the Division of Consumer Services, Department of Consumer Affairs of the State of California, however, such cancellation shall not affect any liability incurred or accrued hereunder prior to the termination of said 30-day period.

4. That said bond shall remain in full force and effect during the validated registration period for which it is issued and for any renewal thereof, or until said bond is, subject to the provisions of paragraph 3 hereof, cancelled by said Surety.

IN WITNESS WHEREOF, The seal and signature of said Principal is hereto affixed, and the corporate seal and the name of said Surety is hereto affixed and attested by its duly authorized officers at _____, this _____ day of _____.

 Principal (print name)

RLI Insurance Company

 Surety

 Principal's Signature

 Attorney in Fact

 Principal Address

 Agent

 Principal Phone Number (Business)

 Agent's Address