

# NAEA

> National Association  
of Enrolled Agents

We Power America's Tax Experts.



Build a strong foundation  
for your future tax career.



# What is an Enrolled Agent (EA)?

A tax practitioner that is authorized to represent taxpayers before all administrative levels of the Internal Revenue Service (IRS) including audits, collections, and appeals.

## What are the requirements?

- Age 18 or Older
- Have a Preparer Tax Identification Number (PTIN)
- Pass a Three-Part Exam
- Complete a Background Check
- No College Degree Required



ENROLLED  
AGENTS  
SPECIALIZE IN:

Tax Preparation  
& Tax Representation

THE BENEFITS OF  
BECOMING AN  
ENROLLED AGENT:

High Earning Potential  
Flexible Work Schedules  
Lots of Job Opportunities



# Enrolled Agents Offer More Than Tax Prep

Enrolled agents advise, represent, and prepare the tax returns of individuals, partnerships, corporations, estates, trusts, and any other entity with tax reporting requirements.

EAs prepare millions of tax returns each year and their expertise in the continually changing field of taxation enables them to effectively represent taxpayers audited by the IRS.

In addition to tax preparation and tax representation, many enrolled agents offer other business-related services, which may include:

## **BOOKKEEPING**



## **FINANCIAL PLANNING OR BUDGETING**



## **PAYROLL SERVICES**



## **PREPARATION & ASSISTANCE**





### **EXPERTISE**

Enrolled agents have unlimited practice rights before the IRS.



### **CREDIBILITY**

Enrolled Agent status is the highest credential the IRS awards.



### **EXPERIENCE**

All EAs specialize in taxation and go beyond basic requirements.

# How Enrolled Agents Stand Out





# How To Become An Enrolled Agent

The EA credential can be a career starter or booster for existing tax preparers, CPAs, and others interested in entering tax preparation. Earning your enrolled agent credential offers you credibility as a federal designation handed down by the U.S. Department of the Treasury.

## So how do you get there?

Enrolled agents (EAs) can become credentialed in one of two ways: with five years of IRS experience regularly interpreting tax regulations or through the successful completion of the three-part Special Enrollment Exam (SEE).



## NAEA Career Panel Discussions



# How to Launch Your EA Career



1

## Obtain a Personal Identification Number (PTIN)

A PTIN must be obtained by all enrolled agents, as well as all tax return preparers who are compensated for preparing, or assisting in the preparation of, all or substantially all of any U.S. federal tax return, claim for refund, or other tax form.

2

## Take the 3-Part Special Enrollment Exam

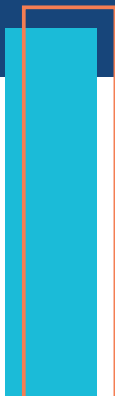
Take and pass the three-part online Special Enrollment Exam (SEE) administered by Prometric.

NAEA has joined forces with [Surgent Accounting & Financial Education](#) to provide aspiring EAs with a best-in-class exam prep solution that's customizable to your level of comprehension.

3

## Enrollment on Form 23 + Background Check

Once you pass the exam, you will apply for enrollment on Form 23. You will also undergo a background check prior to enrollment, which includes a review of your tax transcript and criminal background.





# Expand Your Professional Potential

Whether you want to work for a retail tax preparation company or you want to start your own business, the enrolled agent credential will support your professional credibility as a tax professional.

The National Association of Enrolled Agents is the only organization solely devoted to the support of enrolled agents. Our mission is to empower enrolled agents everywhere.





Here are a few benefits members enjoy — while expanding their career potential:



**Up to 40  
FREE CE  
per Year**



**Monthly  
Roundtable  
Discussions**



**NAEA  
Community  
Webboard**

# Unlock Your Potential with EA Scholarships!

The NAEA Education Foundation (NAEA-EF), established in 1989 is a 501 (c) (3) charitable organization, dedicated to helping aspiring agents reach their goals.

## SCHOLARSHIP

### EA Special Enrollment Exam Prep Course

**Award:** This scholarship provides free and complete access to an on-demand Special Enrollment Exam (SEE) review course. There are four options from review providers offered., one in Spanish.

**Ideal For:** Experienced tax professionals who aspire to become enrolled agents.

### EA Special Enrollment Exam Registration Fees

**Award:** This scholarship provides financial support for cost of the Special Enrollment Exam (SEE) testing fees. The exam consists of three parts, each of which includes a \$259 fee per part, due at the time of scheduling.

**Ideal For:** Experienced tax professionals who aspire to become enrolled agents.

## SUBMISSIONS OPEN:

**SPRING:**  
May 1 - 31

**FALL:**  
Oct. 1 - 31

**LEARN MORE  
ABOUT NAEA-EF & SCHOLARSHIPS**



# OPPORTUNITIES

## **NAEA College Scholarship**

**Award:** This \$1,000 scholarship is designed to support students pursuing an associate degree or certificate in accounting, tax preparation, or a related field at a community college or a two- or four-year college or university. Additional benefits include mentorship from tax pros, educational programs, and more.

**Ideal For:** Second-semester students pursuing an associate degree, bachelor's degree, or certificate in accounting, tax preparation, or a related field.

## **National Tax Practice Institute (NTPI) Level One**

**Award:** Award: This scholarship provides access to Level One of NAEA's National Tax Practice Institute® (NTPI) curriculum.

**Ideal For:** Experienced tax professionals who aspire to enter IRS Representation.

# VALUE OF

# NAEA

> National Association  
of Enrolled Agents

# MEMBERSHIP

## MEMBER BENEFITS

=

Verify Pro Account

\$180



40 Free CE Credits  
live and on-demand annually

\$2,000



1 Client from *Find a Tax Expert*  
Directory Listing

\$300



Tax Talk Today Subscription

\$100



## BENEFIT VALUE

## \$2,580



\*This is the price of the academic membership for 2 years, then a fee is applied the sub membership level. Please contact NAEA for the most current fee schedule. Total value of include all member benefits available. Est



Academic Associate  
Members get free  
national membership  
for two years!



## ACADEMIC ASSOCIATE MEMBERSHIP

**\$0\***

**ESTIMATED SAVINGS \$2,400**

sequent year after complimentary period for up to 8 years. Additional terms apply to this  
of NAEA membership is based on value of a select number of benefit providers. Does not  
imated provider values subject to change.

# Looking for a career that will always be in demand?

Enrolled Agents (EAs) are respected tax specialists who are licensed by the IRS. They work for corporations, independent practices, and in government, and many own their own businesses.

Let NAEA help you jumpstart your career as one of America's tax experts by joining today as an Academic Associate at no charge. NAEA is here to help you enter the enrolled agent profession by connecting you with the people, information, and tools you need to succeed.

## **WHO CAN JOIN NAEA AS AN ACADEMIC ASSOCIATE?**

Looking for a career that will always be in demand? Become an Enrolled Agent - the future is bright ahead.

- Full- or part-time students enrolled in an accredited college, university, or professional school in a tax, accounting, or finance career track.
- Instructors of tax, accounting, or finance career-track classes at accredited colleges, universities, or professional schools.
- Individuals who are defined in Circular 230 or those who have been removed from practice are NOT eligible for this membership category.

## **WHY JOIN NAEA AS AN ACADEMIC ASSOCIATE?**

As an Academic Associate, you can immediately take advantage of the most valuable resources available to NAEA members:

- E@lert, the weekly e-newsletter that will keep you up-to-date on the very latest breaking news in the tax industry.
- Digital issues of EA Journal, NAEA's award-winning, a quarterly magazine that explores tax topics in-depth.
- The NAEA Community Web Forums where NAEA members exchange information and ideas. Access to the "Members Only" section of the NAEA website, where a wealth of member resources can be found to help you in your quest to earn the enrolled agent license and build your business.
- Networking, training opportunities, and timely information on NAEA scholarships and EA Exam prep programs.

## **HOW TO JOIN**

Complete the application on the opposite side and return to immediately start receiving NAEA's support on your way to becoming an Enrolled Agent.

- Join as an Academic Associate and NAEA dues are waived. Please include a copy of your class schedule, transcript, or a letter from your dean as proof of eligibility.
- New Academic Associates must earn their EA license within 10 years.
- Consider joining a state affiliate as well to take advantage of networking and education on the local level.

# Take the First Step Toward a Career in Tax.

Apply for an NAEA Academic Associate Membership and gain early access to resources, connections, and guidance designed to support your future in the tax industry.



## Academic Associate Membership Application

Fill out the form below or apply online →



Name: \_\_\_\_\_

Business Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Postal Code: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Student \_\_\_\_\_ Instructor

College/University: \_\_\_\_\_ Field of study: \_\_\_\_\_

### RETURN TO:

#### National Association of Enrolled Agents

1100 G Street NW, Ste. 450

Washington, DC 20005

Email: [membership@naea.org](mailto:membership@naea.org)

Academic Associates of NAEA are part or full-time students enrolled in an accredited college/university or professional school in a tax, accounting, or finance career track. Instructors of tax, accounting, or finance career-track classes in an accredited college/university or professional schools will also be eligible for this category.

Students must provide proof of registration in tax, accounting, or finance courses, or have an academic major or minor in accounting or finance. Instructors must provide a course catalog highlighting the classes being taught by the instructor, or a letter from the department chair stating that the instructor is currently teaching a tax, accounting, or finance course for the institution. Individuals who are defined in Circular 230 or those who

Renewal and CPE Requirements: Students must earn their EA license within 10 years of joining or change to a full Associate status at full dues.

**Become an  
Enrolled Agent  
- the future is bright ahead.**



The NAEA is the nation's leading community for tax practitioners – from aspiring enrolled agents to experts with decades of experience. We are advancing the professional tax practice through leadership, management, community, and ethics.

1100 G Street NW, Suite 450 | Washington, DC 20005  
(202) 822-6232 | [info@naea.org](mailto:info@naea.org)