

Multistate POA State Survey/Questionnaire:

- Will your state accept the POA?
 - Yes as soon as finalized
 - Yes but will require additional internal approvals
 - We intend to but internal approval will take significant time
- How must a POA be filed in your state?

○ By mail

- Include mailing address

○ Electronically by email

- Include email

○ Electronically by portal/uploaded

- Include link to portal/website where form is uploaded

○ Other

- List other requirements

- Will your state accept an electronic signature?

Yes each of the following formats are accepted:

- A typed name that is typed into the signature block
- A scanned or digitalized image of a handwritten signature
- A handwritten signature input onto an electronic signature pad
- A handwritten signature, mark or command on a display screen with a stylus device
- A signature created using a third-party software (*i.e.*, docuSign)

Only certain types of electronic signatures are accepted

- List all of the above electronic signatures that your state accepts

No, we are statutorily required to obtain a wet signature

Other signature requirements?

- List any additional signature requirements (*i.e.*, notary/witness)

- Does your state require a state specific business identification number be provided on a POA?

Yes

- Please list state specific business identification numbers required to be included

Not Required

- Does your state require any additional information for taxpayer(s) to be provided?

List any additional information required

Not Required

- Does your state require any addition information for authorized representative(s) to be provided?

List any additional information required

Not Required

- What is your state's default rules regarding tax matters?
 - All matters will be covered by the POA unless otherwise noted
 - Specific taxes/fees must be identified
- What is your state's default rules regarding authorized periods?
 - All tax years are authorized by the POA unless otherwise noted
 - Specific tax years/periods must be identified
- Does your state have a default rule on POA revocations?
 - Yes, all previous POAs are revoked when a new POA is filed
 - No, all previous POAs remain in place when a new POA is filed unless explicitly revoked
 - Other
 - List any other default rules

- Does your state require a signature by the authorized representative(s)?

Yes

No

Other

- Other information

- Does your state allow authorized representative(s) to receive copies of notices?

Yes, electronically

Yes, by mail

Yes both

No, we are not authorized to provide copies of notices to the authorized representative(s)

- Does your state require any other information to be included on the POA?

List any other information

- Are there any items that your state would limit regarding the authorized representative's authority?

List any other restrictions/limitations to the representative's authority

Not Required