

**LOUISIANA ASSOCIATION OF TAX ADMINISTRATORS  
CERTIFIED TAX ADMINISTRATOR**

**APPLICATION FOR CERTIFICATION**

*By the Certified Testing Committee of the LATA*

Name \_\_\_\_\_

Title \_\_\_\_\_

Employer \_\_\_\_\_ LATA Member  Yes  No

Approved By \_\_\_\_\_ Date \_\_\_\_\_

***Inside this application, you will find the following:***

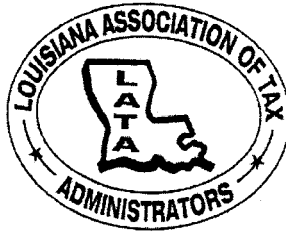
1. Overview of the Certification Program
  - a. Purpose
  - b. Eligibility for Certification
  - c. Application for Certification
  - d. Testing
  - e. Recertification
2. Summary of General Eligibility Requirements & Applicant's Statement
3. Code of Ethics
4. Application for Certified Tax Examiner

**PLEASE MAIL YOUR COMPLETED APPLICATION AND ACCOMPANYING \$75.00 FEE  
BETWEEN SEPTEMBER 1, 2011 – SEPTEMBER 20, 2011 TO:**

**LATA CERTIFIED TESTING COMMITTEE  
C/O KATHY PETTIS  
CALCASIEU PARISH SCHOOL BOARD  
P O DRAWER 2050  
LAKE CHARLES, LA 70602-2050**

**CHECKS ARE TO BE MADE PAYABLE TO THE LATA**

***IMPORTANT NOTES:*** *Application fees are non-refundable once your application is approved. The application fee of \$75.00 is due for each area of certification tested. Applications with postmark dates after September 20, 2011 will be considered late and will not be accepted by the Certified Testing Committee.*



**Louisiana Association of Tax Administrators Certification Program**

**CERTIFIED TAX ADMINISTRATOR**

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Dear Applicant:

The Certified Testing Committee of the Louisiana Association of Tax Administrators is happy to announce that the task of developing a certification program is complete. While we understand that the program will have to expand and adapt to the ever-changing world of taxation, we are confident that our current program will meet the needs of our membership with very little adjustments and/or enhancements at least for a few years to come.

We strongly believe that this program will enhance you individually as an LATA member, as well as the entire organization. Please take the time to read the guidelines and the application for the program thoroughly.

The following pages contain a synopsis of the program as well as the actual application for certification. If you still have questions, concerns, or suggestions pertaining to the program please feel free to contact anyone on the Certified Testing committee so that the answers that you seek may be found.

Sincerely,

***JC Blank and Kathy Pettis, Co-Chairpeople  
Louisiana Association of Tax Administrators  
Certified Testing Committee***



## LOUISIANA ASSOCIATION OF TAX ADMINISTRATORS CERTIFIED TAX ADMINISTRATOR

### OVERVIEW OF THE CERTIFICATION PROGRAM

#### **Purpose**

The purpose of this program is to enhance the abilities and credibility of the membership of the Louisiana Association of Tax Administrators (hereinafter referred to as LATA).

#### **Eligibility for Certification**

The program is intended to be inclusive of all interested tax administrators, BEING RECOGNIZED AS A DESIGNATED VOTING MEMBER, in the fields of sales/use tax, occupational license tax, and ad valorem taxation. While the program will be open to any and all interested parties, only a tax administrator may actually be “certified.” All others may participate and achieve the necessary requirements and upon reaching the stated years necessary, become certified as a tax administrator. The programs are inclusive of all tax administrators in the public sector and available to those in the private industry/business sector who wish to participate, but who must realize that the “certification” is restricted to only those being deemed an “administrator” or “collector” and having a voting right with LATA.

**Experience Requirements** – The applicant must have served in the tax collection position for which certification is sought for at least two (2) years during the five years preceding the date of application for certification.

**Attendance Requirements** – The applicant must have attended at least 75% of all general membership meetings.

**Membership Requirement** – The taxing jurisdiction, to which they represent, must have been a member of LATA for three years or more.

#### **Application for Certification**

Once the applicant has met all of the stated qualifications and achieved the necessary one hundred points needed, OR where the administrator is in a position to begin working toward certification by way of education, experience, or attendance, the application for certification must be mailed to the Continuing Education Committee for a validity review. Also, there is a **\$75.00** application fee, per area of certification tested, that should also be included made payable to LATA. The application and the fee should be postmarked by the **20th day** of September each year to allow for testing. Upon validation, the committee will contact the applicant to inform them of the test date and time.



**Testing of Applicant**

All applicants meeting the designed criteria will be subjected to a test of their knowledge. The test will be administered once a year. There will be three test areas: 1) Sales/use tax; 2) Occupational license tax; and 3) Ad Valorem tax. Successful passage of the test will require a composite score of 80%. If an applicant fails the test, he/she will be allowed to again retest the following year with new questions developed by the Board of Directors and the Certified Testing Committee. The applicant must remit the testing fee for re-examination.

**Continuing Professional Education / Recertification**

After achieving certification, the applicant must continue to strive to maintain that honor. Certified Tax Administrator candidates who pass the CTA exam will be required to obtain continuing professional education to keep their certification. The recertification will be granted in every odd-numbered year. The reporting period for continuing professional education runs from October 1<sup>st</sup> to September 30<sup>th</sup>. In the event a member fails to meet the continuing education requirements, the certification will be withdrawn and all points accumulated within the two-year period will be dismissed and the participant will again start with zero points. The participant will then have two years to again achieve the necessary points (50 points) to be re-certified, but **WILL ALSO HAVE TO RETEST**.

While an applicant may achieve the required fifty points in a variety of ways over the two-year period, active participation at LATA conference is sufficient by way of:

- |    |                            |  |
|----|----------------------------|--|
| 1. | Participation at Quarterly | 36 points – 6 points per quarter       |
| 2. | Participation at Annual    | <u>18 points – 9 points per annual</u> |
|    |                            | 54 points – Total possible             |

The number of points earned must include at least seventy-five (75) percent participation at an LATA meeting (conference) annually. The LATA Continuing Education Committee has established CPE credit that will be allowed for attendance at Information Exchange meetings:

- |    |                               |         |
|----|-------------------------------|---------|
| 3. | Information Exchange Meetings | 2 hours |
|----|-------------------------------|---------|

Conference/class credit for participation in other sales tax training courses or seminars will be given on an hour for hour basis versus the set point value assigned for the same classes and seminars that a participant attempting to initially certify would receive. Hours will not apply to committee meetings or the Board of Directors meeting.



**LOUISIANA ASSOCIATION OF TAX ADMINISTRATORS  
CERTIFIED TAX ADMINISTRATOR**

**APPLICATION FOR CERTIFICATION**

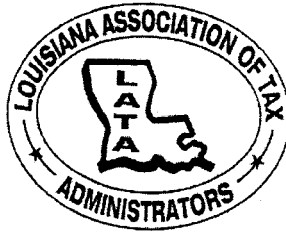
**SUMMARY OF GENERAL ELIGIBILITY REQUIREMENTS**

1. Applicant must currently be employed as an Administrator of a local sales and use tax parish agency in Louisiana for at least two (2) years during the five (5) preceding the date of this application.
2. Applicant must adhere to the attached Code of Ethics as prescribed by the Louisiana Association of Tax Administrators.
3. Applicant must have been active in the Louisiana Association of Tax Administrators during the past two (2) years by attending at least 75% of its meetings. The Tax Agency to which they represent must also have been a member of the Louisiana Association of Tax Administrators for three (3) years or more.
4. Applicant must earn a total of 100 points based on experience, education and attendance in order to be tested. The requirements for each category are included in this application.

**APPLICANT'S STATEMENT**

I hereby apply for certification as a Certified Tax Administrator by the LATA, and hereby attest that I have met the General Eligibility Requirements and that the following statements and presentations are accurate and true to the best of my knowledge.

Signature \_\_\_\_\_ Date \_\_\_\_\_



**LOUISIANA ASSOCIATION OF TAX ADMINISTRATORS  
CERTIFIED TAX EXAMINER**

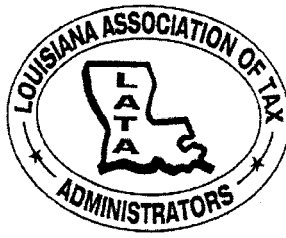
**CODE OF ETHICS**

A **TAX ADMINISTRATOR** in Louisiana is a professional who is dedicated to the service of the state and local taxing authorities of this state. As such, the professional's behavior must conform to a code of ethics. The code must be both idealistic and realistic as applied to our members in the day-to-day practical application of its principles. The tax administrator shall assume the responsibility of providing leadership and expertise in the profession and maintaining exemplary standards of conduct both professionally and morally. It is understood that the tax administrator's actions are observed and evaluated by fellow employees and professionals, members of the community, the taxpayers, and the taxing authorities served.

**THEREFORE**, and to these ends, members of the Louisiana Association of Tax Administrators subscribe to the following statements of ethical standards.

**THE TAX EXAMINER / TAX PROFESSIONAL SHALL:**

- Recognize the fact that the chief function of government in our country is to serve and act in the best interest of the citizens.
- Obey all federal, state and local laws, which govern the activities of tax professionals.
- Be dedicated to the highest ideals of honesty and integrity in all matters in order to merit the respect and confidence of the citizens and officials of the governmental bodies served.
- Ever strive to be impartial, fair, neutral and uniform in the administration of the tax laws, without regard to personal bias, family relationships, business dealings or other apparent conflicts of interest, and grant no exemption, exclusion, credit or other advantage to any taxpayer or group of taxpayers, which is not provided by law.
- Record that which is true and maintain and preserve that which is entrusted to him/her in accordance with the law.
- Provide prompt, efficient and quality service to the community and government agencies served in an effort to exceed their expectations.
- Allocate the tax proceeds among the taxing authorities served in accordance with the incidence of taxation and local ordinances without regard for which taxing authority employs him/her.
- Seek no favor; shall be totally convinced that personal gratification, profit secured by confidential information, failure to perform one's duty or the misuse of public time is not only illegal, but is dishonest.

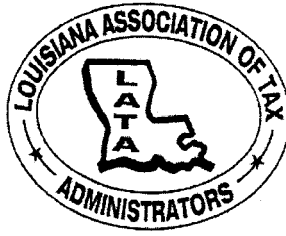


- Be dedicated to the concept that effective democratic state and local government, administered by quality public officials who are focused on constructive and creative public service, instills in the citizens a deep sense of confidence and trust.
- Refrain from all partisan political activities that would impair performance of a tax professional.
- Make every reasonable effort to collect the proper amount of tax revenue due at the lowest possible cost to those we serve, and in a manner that warrants the highest degree of confidence in our integrity, efficiency, effectiveness and fairness.
- Respond to valid taxpayer refund claims and other known overpayments with the same diligence as employed in the collection of taxes.
- Attempt to determine the extent of compliance and the reasons for noncompliance. Then by educating dealers regarding their responsibilities and rights, encourage the highest possible level of voluntary compliance with the tax laws.
- Maintain taxpayer confidentiality in accordance with the law.
- Be punctual in responding to taxpayer communications.
- Exercise diligence in hiring or retaining professionals, such as attorneys, accountants, and contract auditors, and demand that they comply with this code as well as any codes of professional responsibility applicable to their respective professions.
- Continually search for and implement more effective and efficient ways to improve the ethical performance of all members of our honorable profession.

These things, I, as a Tax Administrator, do pledge to do in the interest and purposes for which our office has been established.

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Signature



**LOUISIANA ASSOCIATION OF TAX ADMINISTRATORS  
APPLICATION FOR CERTIFIED TAX ADMINISTRATOR**

**I. PERSONAL DATA**

Name \_\_\_\_\_  
Last First Middle

Home Address \_\_\_\_\_  
City State Zip Code

Mailing Address \_\_\_\_\_  
City State Zip Code

Home Telephone Number (\_\_\_\_\_) \_\_\_\_\_ Alternate Phone Number (\_\_\_\_\_) \_\_\_\_\_  
Area Code Area Code

**II. EMPLOYMENT DATA**

- 1. Years of experience as a Tax Administrator 5 points for each year of service
- 2. Years of experience as an Assistant Tax Administrator 4 points for each year of service
- 3. Years of experience in a tax related position 2 points for each year of service

**PRESENT POSITION:**

Employer's Name \_\_\_\_\_

Employer's Mailing Address \_\_\_\_\_  
City State Zip Code

Employer's Phone Number (\_\_\_\_\_) \_\_\_\_\_ Fax Number (\_\_\_\_\_) \_\_\_\_\_  
Area Code Area Code

Current Position \_\_\_\_\_ From \_\_\_\_\_ to \_\_\_\_\_  
(Month/Year) (Month/Year)

E-Mail Address \_\_\_\_\_

Full-time  Part-time Total years \_\_\_\_\_ @ \_\_\_\_\_ = \_\_\_\_\_



**LOUISIANA ASSOCIATION OF TAX ADMINISTRATORS  
APPLICATION FOR CERTIFIED TAX EXAMINER**

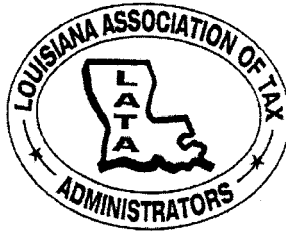
**FORMER POSITIONS:**

A. Employer's Name \_\_\_\_\_  
Employer's Mailing Address \_\_\_\_\_  
City State Zip Code  
Employer's Phone Number (\_\_\_\_\_) \_\_\_\_\_ Fax Number (\_\_\_\_\_) \_\_\_\_\_  
Area Code Area Code  
Former Position \_\_\_\_\_ From \_\_\_\_\_ to \_\_\_\_\_  
(Month/Year) (Month/Year)  
 Full-time  Part-time Total years \_\_\_\_\_ @ \_\_\_\_\_ = \_\_\_\_\_

B. Employer's Name \_\_\_\_\_  
Employer's Mailing Address \_\_\_\_\_  
City State Zip Code  
Employer's Phone Number (\_\_\_\_\_) \_\_\_\_\_ Fax Number (\_\_\_\_\_) \_\_\_\_\_  
Area Code Area Code  
Former Position \_\_\_\_\_ From \_\_\_\_\_ to \_\_\_\_\_  
(Month/Year) (Month/Year)  
 Full-time  Part-time Total years \_\_\_\_\_ @ \_\_\_\_\_ = \_\_\_\_\_

C. Employer's Name \_\_\_\_\_  
Employer's Mailing Address \_\_\_\_\_  
City State Zip Code  
Employer's Phone Number (\_\_\_\_\_) \_\_\_\_\_ Fax Number (\_\_\_\_\_) \_\_\_\_\_  
Area Code Area Code  
Former Position \_\_\_\_\_ From \_\_\_\_\_ to \_\_\_\_\_  
(Month/Year) (Month/Year)  
 Full-time  Part-time Total years \_\_\_\_\_ @ \_\_\_\_\_ = \_\_\_\_\_

**TOTAL POINTS FOR EMPLOYMENT:** \_\_\_\_\_



**LOUISIANA ASSOCIATION OF TAX ADMINISTRATORS  
APPLICATION FOR CERTIFIED TAX EXAMINER**

**III. EDUCATION**

*Please check the appropriate box. To receive credit for your education requirement, you must provide a copy of your transcript from the university, college, vo-tech, or other institution must be enclosed.*

- |  |  |
|--|--|
| 1. Bachelor's Degree in Business Related Field     | 50 points  |
| 2. Bachelor's Degree in Non-Business Related Field | 25 points (plus 2 points for each business related course) |
| 3. Associate Degree in Any Field                   | 15 points (plus 2 points for each business related course) |
| 4. Post Secondary Education (Non-Degree)           | 2 points (for each business related course)                |
| 5. Non-Collegiate Courses and Seminars             | 1 point (per course)                                       |

Degree Conferred:

- Bachelor of Arts       Bachelor of Science       Other Bachelor's Degree

Date Degree Conferred: \_\_\_\_\_

Major: \_\_\_\_\_ Date Rec'd \_\_\_\_\_ Points \_\_\_\_\_

University/College \_\_\_\_\_ Location \_\_\_\_\_

- Associate Degree

Major: \_\_\_\_\_ Date Rec'd \_\_\_\_\_ Points \_\_\_\_\_

University/College \_\_\_\_\_ Location \_\_\_\_\_

- Other

Did not receive a degree. Please see my transcript for courses taken. Points \_\_\_\_\_

University/College/Institution \_\_\_\_\_ Location \_\_\_\_\_

**TOTAL POINTS FOR EDUCATION: \_\_\_\_\_**



**LOUISIANA ASSOCIATION OF TAX ADMINISTRATORS  
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**IV. ATTENDANCE**

- |                                       |                                     |
|---------------------------------------|-------------------------------------|
| Participation at Quarterly Conference | 6 points – (36 points in two years) |
| Participation at Annual Conference    | 9 points – (18 points in two years) |
| Information Exchange Meetings         | 2 points per meeting                |

Maximum number of Attendance points allowed is 40 points.

- *Points awarded per session according to the sign in sheet posted at each session of a conference. No points to be awarded for committee meetings or Board of Directors meetings.*

Conference / Training Attended	Date of Conference	Location of Conference/Training (City and State)	Number of Sessions Attended
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

**TOTAL ATTENDANCE POINTS:** \_\_\_\_\_

