



Before we file your Sales & Use Tax Permit

Fill in what you can, on screen or by hand, and send it back to us. This form consolidates the Texas Comptroller's application (Form AP-201) so you only provide each item once. A sales tax permit is required before your first taxable sale in Texas, and it is the foundation most other permits are built on, including TABC, tobacco and lottery. Calibre Licensing Services prepares and files the application and follows up with the Comptroller until the permit is issued. If you are missing something, leave it blank and we will help you get it.

Don't have an entity, DBA or EIN yet? We file all of these as well. Just note it on the form and we will handle it before the sales tax application.

1. Business Entity Information

Business organization type

- | | |
|---|--|
| ☐ Limited Liability Company | ☐ Profit Corporation |
| ☐ Sole Proprietor | ☐ General Partnership |
| ☐ Limited Partnership | ☐ Nonprofit Corporation |
| ☐ Trust (attach trust agreement) | ☐ Other |

Legal name of the entity

Exactly as registered with the Texas Secretary of State. Sole proprietors: your full legal name (first, middle initial, last). No entity yet? We can register it.

Business name (DBA), if any

The name on the sign, if different from the legal name. No DBA yet? We can file it.

Corporations only: has the corporation been involved in a merger within the last seven years? ☐ Yes ☐ No

If yes, a detailed explanation must be attached.

2. Owners, Officers & Managing Members

List every general partner, officer, director or managing member. Attach a page if you need more than three. Sole proprietors may skip this section.

Person 1

Full legal name

Phone

SSN (or FEIN if an entity)

Home address (street)

City

State

ZIP

County

Position held

- | | |
|--|---|
| ☐ General partner | ☐ Officer / director |
| ☐ Managing member | ☐ Other |

Percent of ownership (%)



Person 2

Full legal name

Phone

SSN (or FEIN if an entity)

Home address (street)

City

State

ZIP

County

Position held

☐

General partner

☐

Officer / director

☐

Managing member

☐

Other

Percent of ownership (%)

Person 3

Full legal name

Phone

SSN (or FEIN if an entity)

Home address (street)

City

State

ZIP

County

Position held

☐

General partner

☐

Officer / director

☐

Managing member

☐

Other

Percent of ownership (%)

3. Mailing Address & Contacts

Mailing address of the taxpaying entity (not your registered agent's address; include suite or unit number)

Street, P.O. Box or rural route

Suite / unit

City

State

ZIP

County

Daytime phone

Mobile phone

Fax (optional)

Business website address(es)

Leave blank if none.

Contact person for business records

Name

E-mail address

Phone (with extension)

Street address, if different from the mailing address

Alternate contact person for business records

Name

E-mail address

Phone (with extension)

Bank or financial institution (business account)

Bank or financial institution (personal account)



Credit card / online payment processor, if any

Merchant identification number (MID)

Need a payment processor? Ask us about merchant services for your new location.

4. Place of Business

The physical store, restaurant or office where you sell. Not a P.O. Box. If you will have more than one location in Texas, attach a page for each.

Street address (physical location)

Suite

City

ZIP

County

City limits the location is inside (or write "none")

Business location phone

If the address is hard to find: physical location or directions

Owner or landlord of this place of business

Name

Address (street, city, state, ZIP)

Is this place of business operated from your home?

☐ Yes ☐ No

Do you ship or deliver items to cities or counties in Texas other than where your place of business is?

☐ Yes ☐ No

Do you have any other physical location in Texas: warehouse, distribution center or office?

☐ Yes ☐ No

If yes: address(es)

Do you have representatives, agents, salespersons or solicitors who take orders or sell for you in Texas?

☐ Yes ☐ No

If yes: their names and addresses

Do you own, use, sell, lease or rent tangible personal property located in Texas (this includes storing machinery and equipment)?

☐ Yes ☐ No

Do you provide onsite taxable services at customer locations in Texas?

☐ Yes ☐ No

Do you sell at temporary locations such as fairs, markets or trade shows?

☐ Yes ☐ No

If yes: event names and when you attend

Do you have a franchisee or licensee operating under your name who must collect Texas sales tax?

☐ Yes ☐ No

Are you substantially owned by, or do you substantially own, another business that sells a similar product line under a similar name from a Texas location?

☐ Yes ☐ No



Are you substantially owned by, or do you substantially own, a person who maintains a Texas location to advertise, promote or handle sales, deliveries or returns of your products? ☐ Yes ☐ No

5. Sales Activity

Date you will begin making sales (mm/dd/yyyy) Anticipated monthly taxable sales (\$) NAICS code, if known

Will you operate this business all year? ☐ Yes ☐ No

If no: months you will operate

Principal type of business

- | | | |
|---|--|--|
| ☐ Retail trade | ☐ Services | ☐ Wholesale trade |
| ☐ Manufacturing | ☐ Construction | ☐ Real estate |
| ☐ Transportation | ☐ Finance / insurance | ☐ Health spa |
| ☐ Direct sales | ☐ Utilities / telecom | ☐ Other |

Primary business activity and products or services sold

For example: convenience store selling groceries, beer and wine, tobacco and lottery.

Will your anticipated monthly taxable sales exceed \$8,000 per month? ☐ Yes ☐ No

Do you have internet or mail order sales? ☐ Yes ☐ No

Are you a marketplace provider (you run a platform where other sellers list items)? ☐ Yes ☐ No

Will you sell alcoholic beverages? ☐ Yes ☐ No
If yes, you will also need a TABC permit. We file those too; check the option below.

If yes, which TABC permit will you hold? ☐ Mixed beverage ☐ Beer and wine
☐ Not applied yet: please file it for us

Will you sell electronic cigarettes or vapor products? ☐ Yes ☐ No
If yes, a separate Comptroller e-cigarette retailer permit is required. We file it with this application.

If yes: will you sell e-cigarettes over the internet, by mail order or by telephone? ☐ Yes ☐ No

If yes: e-mail address or website URL used for those sales

Will you sell fireworks? ☐ Yes ☐ No

Will you sell memberships to a health spa? ☐ Yes ☐ No
If yes, a copy of the Health Spa certificate of registration from the Secretary of State must be attached.

Will you sell, lease or rent off-road, heavy-duty (50 horsepower or more) diesel-powered equipment? ☐ Yes ☐ No



Calibre Licensing Services

Sales & Use Tax Permit Intake Form

(346) 767-7855
info@calibretx.com
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Will you provide telecommunications services or sell prepaid wireless service?

If yes, 9-1-1 emergency service fees apply. We will confirm which ones.

☐ Yes ☐ No

Is this permit for a winery outside Texas that will ship wine to Texas consumers?

If yes, an Out-of-State Winery Direct Shipper's Permit from TABC is also required.

☐ Yes ☐ No

If you answered no to every question about other locations, agents, marketplace and health spa above: do you want the optional Single Local Tax (SLT) rate?

Leave this to us if unsure. We will recommend the option that fits your business.

☐ Yes ☐ No

6. Previous Owner

Only if you purchased an existing business or its assets. Skip if this is a brand-new business.

Previous owner's trade name (DBA)

Previous owner's Texas taxpayer number, if known

Previous owner's legal name

Title

Phone

Previous owner's address (street, city, state, ZIP)

What you purchased

☐ Inventory

☐ Corporate stock

☐ Equipment

☐ Real estate

☐ Other assets

Purchase price (\$)

Date of purchase (mm/dd/yyyy)

7. Attachments

☐ Copy of each owner's driver's license attached

☐ Trust agreement attached (trusts only)

☐ Health Spa certificate of registration attached (health spas only)

☐ Merger explanation attached (corporations with a merger in the last 7 years)

☐ I would like CLS to prepare a power of attorney so CLS can sign and submit on my behalf

What happens next. The Comptroller issues most permits within about four weeks of receiving a complete, signed application. Incomplete applications are the main cause of delay, which is exactly what this form prevents. We will confirm receipt within 24 hours and keep you posted until the permit arrives.

Completed by (name)

Phone

Date

Questions while filling this in? Call **(346) 767-7855** or e-mail **info@calibretx.com**. We reply within 24 hours.