CALIFORNIA SOCIETY OF TAX CONSULTANTS

The Inland Empire Tax Gazette

Newsletter of the Inland Empire Chapter of the California Society of Tax Consultants. Published monthly May through December.

Editor: Hilde Morrow

May 2018

California Society of Tax Consultants
Inland Empire Chapter

PRESIDENT'S MESSAGE

Dear Members,

WELCOME BACK! I hope you all had a successful tax season. I took a couple of short vacations, and now am ready for Continuing Education so I can be of better service to my clients.

I am pleased that Gary Quackenbush will be speaking to us on May 16. Hope to see you there!

Sincerely,

Renee

Renee McClellan, President CSTC Inland Empire

May 16, 2018—Dinner Meeting Topic and Speaker

"NOW THAT THE CLIENT HAS DIED" -

What is the tax professional's role in settling the client's Estate or Trust?

2 HOURS CE CREDIT—1 HOUR FEDERAL TAX LAW AND 1 HOUR CA
FEDERAL PROGRAM # TBA, CTEC #s TBA

SPEAKER: GARY QUACKENBUSH, Esq.

"In this world nothing can be said to be certain, except death and taxes." Benjamin Franklin

As tax professionals we spend a lot of time determining just how certain taxes are and how to assist our clients in navigating the treacherous waters of the US tax code. This class will explore the first half of Benjamin Franklin's statement, that death is the other certain factor. Most of us have dealt with, and all of us will deal with the death of a loved one or of a client. As a tax professional, there are certain responsibilities that must be undertaken, ethically, to assist the client's survivors to settle the affairs of a deceased client.

This class will help you understand what should be done and what must be done as a tax professional and the boundaries within which you must work to carry out your ethical obligation to your clients and their survivors.

This class will start with the basics and quickly move into intermediate details involving the tax professional's responsibilities regarding trust administration and estate settlement.

Please find Speaker Bio and other information on page 3

Inside this issue:

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Newsletter Editor

Hilde Morrow
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MAY 16, 2018 DINNER MEETING

DoubleTree Hotel Claremont

555 West Foothill Blvd, Claremont, CA 91711

Phone: 909.626.2411

Wednesday, May 16, 2018

- **5:30 pm Sign-In**
- **6:00 pm General Meeting**
- **7:00 pm—9:00 pm Speaker**
- *For Reservations and Menu Preference:*

Phone: **909.575.1066** (message phone)

Please make your reservation on or before May 12, 2018, 11:59 pm.

Pay at the event with check or cash. We are unable to accept credit cards.

==MENU==

- **House Salad** with Ranch & Italian Dressings
  Fresh Rolls and Butter
- **Main Menu:**
  Braised Boneless Beef Short Rib
  Chef's Choice of Starch
  Chef's Choice Vegetable
  OR
  Potato Lasagna with Grilled Vegetables, Tomato Basil Sauce and Asiago Cheese
  Chef's Choice of Accompaniments

Coffee, Ice Tea

Chef's Choice Dessert

MEETING COST

$35 Members with timely reservations. Reservations are timely if called in by May 12, 2018, 11:59 pm.

$50 Members who call in after the May 12, 2018 deadline

$50 Non-Members and all Walk-Ins

NOTE: If you bring a guest or guests to the event, please provide their name(s) and menu preference when you call in the reservation(s).

Cancellation Policy: In the unlikely event that you made a reservation and **ARE UNABLE TO ATTEND** please call the reservation number again and cancel your reservation. Our chapter has to pay for all dinners ordered whether eaten or not. The deadline to cancel a reservation is **Saturday, May 12, 2018, 11:59 pm**. If not cancelled by that date you will be billed for the cost.

Our next Board Meeting will be on May 16, 2018 at 4:00 pm. All members are welcome to attend. The meeting will be at the DoubleTree Hotel in the same room as our dinner meeting.

We are again offering a SPECIAL DISCOUNT for those who pay for ALL of the 2018 Dinner Meetings at this May 16, 2018 meeting. The details are spelled out below.

$210 for 8 meetings (7 educational meetings and a Holiday Party in December). This represents a savings of $70 over the timely member meeting price of $35/meeting. The special discount price is nonrefundable, nontransferable and will not carry over to 2019.

Our per meeting price will remain at $35/meeting with timely reservations and $50/meeting for late registration, non-members and walk-ins.

Our permanent dinner list is obsolete. If you plan on attending our May 16 , 2018 meeting you must call in your reservation. The phone # is: 909.575.1066

Sign up forms for the 2018 permanent dinner list will be available at the May meeting.

May 16, 2018—Dinner Meeting Topic and Speaker continued from page 1

Speaker: GARY A. QUACKENBUSH, Esq.
Financial Solutions Attorney

Gary Quackenbush operates his Financial Solutions law practice, GQ LAW, out of the Rancho Bernardo area in San Diego, California. Since 1988 his emphasis has been tax and financial problem solving and implementing solutions for tax problem resolution such as; Offers in Compromise, audit reconsideration, appeals, installment agreements, bankruptcy, federal district court actions, federal tax court actions, etc.

His estate planning practice focuses on wills, trusts, and estate administration including probate court work. His office handles civil litigation cases such as personal injury, contract disputes, property disputes, and business matters. His business consulting involves choice of and formation of business entities such as sole proprietorships, partnerships, corporations, and Limited Liability Companies.

Gary received a Bachelor of Science degree in business finance from Brigham Young University in 1984. He received his Juris doctorate from California Western School of Law in 1988. He is admitted to practice in all courts in the state of California and in all courts in the state of Colorado, US Bankruptcy Court in the Southern and Central Districts of California, Federal District Court in the Southern and Central districts of California, Federal District Court and US Bankruptcy Court in the District of Colorado, and U.S. Tax Court.

Gary is the host of his own radio show “GQ on the Law” on Stitcher Radio and can be found in iTunes. He is a weekly guest on the “Word on Wealth” radio program with Marty Schneider on KCBQ 1170AM and KPRZ 1210 AM.

He is past president of the California Society of Tax Consultants at the state level and is president of CSTC San Diego Chapter.

IRS APPROVED CONTINUING EDUCATION PROVIDER

CTEC APPROVED CONTINUING EDUCATION PROVIDER

This presentation has been designed to meet the requirements of the Director of Practice of the Internal Revenue Service; the California State Board of Accountancy; and the California Tax Education Council including code 31 of Federal Regulations 10.6(g). This does not constitute an endorsement by these groups. A listing of additional requirements to renew tax-preparer registration may be obtained by contacting CTEC at PO Box 2890, Sacramento, CA 95812-2890, or phone CTEC at 1-877-850-2832, or on the Internet at www.ctec.org.

DUE TO LIMITED RESOURCES THE IRS WILL NO LONGER PROVIDE SPEAKERS FOR OUR MEETINGS!

For as long as I have been a member of CSTC Inland Empire Chapter (2001) we have been able to get an IRS speaker each year for one of our chapter meetings. Amy Smith, Sr. Stakeholder Liaison, from the IRS San Bernardino Office was our regular IRS speaker. She kept us up to date on what was happening at the IRS and all of us looked forward to and enjoyed her yearly presentations.

Amy retired in November 2017. She told us that Katie Williams, Sr. Stakeholder Liaison, from San Diego would be the primary manager for the Inland Empire Practitioner Organizations and that she would be assisted by Lisa Hamilton in El Monte.

I contacted Katie Williams and asked if either she or Lisa Hamilton could be a presenter at one of our meetings this year. Katie replied thanking us for the invitation to speak at our chapter. Unfortunately, she had to decline because of limited resources, the IRS no longer can participate in Chapter meetings. She also had to cancel two scheduled meetings in the San Diego area.

On the positive side the IRS is planning an Inland Practitioner Liaison Meeting in June. With their short staff it is their hope that chapters will attend so Key IRS Messages can be shared with their members. We have already received an invitation for the Event and two of our Board members will represent our chapter. We will keep you informed.

Hilde Morrow, 1st VP and Newsletter Editor

2018 CSTC INLAND EMPIRE CHAPTER MEETING CALENDAR

All our meetings are on the third Wednesday of the month.

APPROVED CONTINUING EDUCATION PROVIDER

APPROVED CONTINUING EDUCATION PROVIDER

Date	Topic	Speakers
May 16, 2018	"NOW THAT THE CLIENT HAS DIED" - What is the tax professional's role in settling the client's Estate or Trust	Gary Quackenbush, Esq.
June 20, 2018	"Divorcing Couples Tax Checklist"	Armand D'Alo, EA & Robbin D'Alo, EA
July 18, 2018	"Shannon's Hall of Tax Oddities"	Shannon Hall
Aug 15, 2018	TBA	TBA
Sept 19, 2018	TBA	TBA
Oct 17, 2018	TBA	TBA
Nov 14, 2018*	"Audit red flags and tips and IRS collection techniques"	Quinn Disparte, Esq.
Dec 19, 2018	Holiday Party Annual Meeting & Installation of 2019 Board	Program TBA

May through November: 2 hours education credit, December: Holiday Party, no education credit.

Speakers and Topics subject to change without prior notice.

*The November meeting is on the second Wednesday of the month due to the Thanksgiving weekend.

August, September and October topics and speakers are pending.

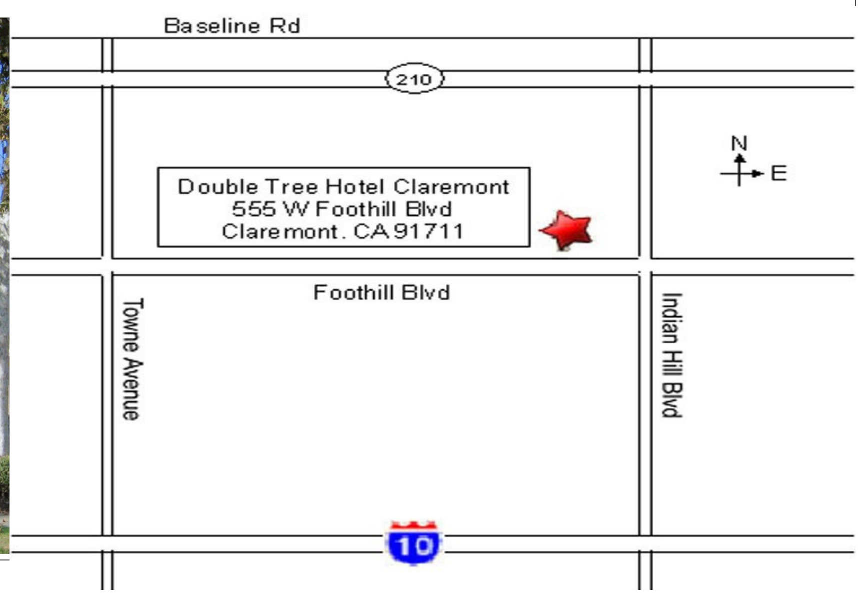
Annual Update and Review Workshop

Federal Update and California Update

January 5, 2019— 8 hours CPE credit

Where: DoubleTree Hotel, Claremont

THIS IS OUR 2018 MEETING LOCATION



Membership Anniversaries

January 2018 through May 2018

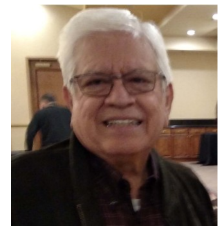
Thank you for your loyalty to our Chapter!

Russ Bisgaard
28 years January

Devi Curtis
4 years January

Frank Medrano
7 years January

Mary Ann Teders
30 years January



Joseph Roa
16 years February

Maria Barajas
7 years March

Jo Olchawa
12 years March

Nathaniel Chuckwu
3 years April

Duberly Beck
4 years May

Emanuel Escalante
3 years May

Wayne Hardesty
22 years May

Sharon Hardy
23 years May

Don Klotz
19 years May

Cecilia Martinez
5 years May

Sergio Martinez
5 years May

PICTURES OF THE MEMBERS LISTED BELOW WERE NOT AVAILABLE AT PRESS TIME

David Liem	12 years January	Robert Hammack	2 year March
Joe Hobbs	22 years May	Thomas Willenborg	29 years May
Rosa Zendejas	2 year May		

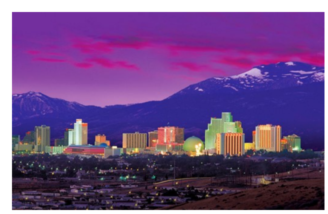
Accept challenges, so that you may feel the exhilaration of victory.

If you want to stand out, don't be different; be outstanding.

CSTC Inland Empire Chapter Benefits

- **A free Quickfinder or TheTaxBook** for members who attend at least **5 of our educational dinner meetings** (December does not count), **or 4 meetings and the January 2018 Workshop**.
- Members who prepay for their 2018 dinner meetings, will be able to save $70 off the total price. The pre-pay cost for 8 meetings is $210. **The deadline to prepay is May 16, 2018.** The special discount price is non-transferable and non-refundable. No dinners will carry over to 2019.
- Chance to win a $15 gift card for wearing your badge to the meetings.
- Any member who signs up a new member gets a $15 off dinner certificate the month after the person joins. The new member will also get a $15 off certificate (this does not apply to prior members who join again).
- A monthly free Newsletter.
- Seven educational dinner meetings May through November (2 hrs CPE/meeting) and one Holiday Party meeting in December. Entertainment will be provided at the December meeting. (See pricing options above.) The member cost per meeting is $35 with timely reservations. The charge for late reservations, non-members and walk-ins is $50.
- **One** Saturday all day workshop (8 hours CPE) - cost to be announced later.
- Non-credit breakfast meetings during tax season provide a chance to network and get answers to difficult tax questions from other tax professionals.

CSTC 32nd Summer Tax Symposium Reno, NV



June 10, 2018 Registration and Social

June 11, 12 and 13, 2018 Education

Offering up to 25 hours of Tax Education and 35 sessions to choose from.

- If you have not registered yet and want to go, there is still time to sign up. You can get all your required education in one place.
- Sign up on line: www.cstcsociety.org or mail your registration form to the Society Office:

California Society of Tax Consultants, 65 Enterprise, Aliso Viejo, CA 92656 — Phone: 949.715.4192

The California Society of Tax Consultants was born in Southern California in 1966. Today we have 15 Chapters in California. CSTC's emphasis on high quality education and its atmosphere of friendly sharing make it an ideal organization for the tax professional

MISSION STATEMENT

CSTC advances professionalism within the tax industry by:

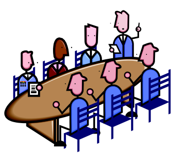
- Providing quality education
- Creating networking opportunities
- Advancing professional standards

Improving the tax industry, one professional at a time

2018 BOARD OF DIRECTORS

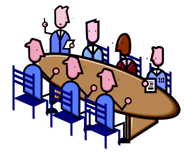
The term of office is one year, unless otherwise stated

OFFICERS




President

Renee McClellan



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and Newsletter Editor

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Francisco "Frank" Medrano

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Ann Mills

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Duberly Beck

Past President
Not an elected position
Priscilla "Pris" Lerma

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Janice Coleman

Director—Member at Large

Armando Armenta

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Annette Finnerty

Photographer

Myriam Mourani

Photographer

CLASSIFIED ADS

Fellow CSTC member and Enrolled Agent **Tina Garcia** is available to represent clients before the IRS and FTB. Tina will represent taxpayers in correspondence, office and field examinations of individual income tax and payroll tax returns as well as collection matters. She has been an enrolled agent for 23 years after a 14 year career with the IRS in the Examinations and Criminal Investigation Divisions. Tina is tri-lingual (English/Spanish and some Portuguese).

Phone: (909) 626-7706 Email: EnrolledAgent@icgarcia.com

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There is no charge to members to advertise positions available in their practice, equipment for sale, or similar subjects. Members looking for a new employer may also advertise.

For non-members and for promotional advertising, there is a $15 charge for each advertisement in the newsletter, limited to business-card size, subject to available space and the discretion of the Chapter Board. Advertising does not constitute endorsement by the Inland Empire Chapter of the California Society of Tax Consultants.

Please contact Hilde Morrow if you would like to place an ad.

Email: HildeMorrow@Prodigy.net

VeriFyle Pro Now Free for CSTC Members

NEW

VeriFyle

CSTC is pleased to include the VeriFyle Pro™ premium secure online document and message sharing service at no cost to CSTC members. The CSTC / VeriFyle partnership provides members with a secure way to share documents and messages with clients, colleagues, employees and other business associates.

VeriFyle is meant to replace other less secure technologies (like email and cloud sharing services like Dropbox) for the purpose of sharing important or sensitive information.

Did you Know?

Any member who signs up a new member gets a $25 credit towards their next year's membership dues (Society Benefit) and a $15 off dinner certificate the month after the person joins (Chapter Benefit).

The new member will also get a $15 off certificate (this is a Chapter Benefit as well).

The above benefits do not apply to members who join again after a break.

FROM THE TAX FRONT

Tax Reform Tax Tip 2018-68—May 3, 2018

Tax Reform: Changes to Depreciation Affect Businesses Now

As employers across the country celebrate National Small Business Week, the IRS reminds businesses that the passage of the Tax Cuts and Jobs Act may affect their depreciation deductions and taxes.

Business taxpayers can generally depreciate tangible property except land, including buildings, machinery, vehicles, furniture and equipment.

Changes to depreciation and how they will affect businesses may include:

•Businesses can immediately expense more under the new law; taxpayers may elect to expense the cost of any property and deduct it in the year the property is placed in service.

•Maximum deduction increased from $500,000 to $1 million.

•The phase-out threshold increased from $2 million to $2.5 million.

•The new law allows taxpayers to elect to include improvements made to nonresidential property. The improvements must have been made after the date the property was first placed in service.

These improvements include:

- Any improvement to a building's interior
- Roofs
- Heating and air conditioning systems
- Fire protection systems
- Alarm and security systems

Improvements that do not qualify:

- Enlargement of the building
- Service to elevators or escalators
- Internal structural framework of the building

These changes apply to property placed in service in taxable years beginning after December 31, 2017.

Share this tip on social media -- #IRSTaxTip: Tax Reform: Changes to Depreciation Affect Businesses Now. https://go.usa.gov/xQ8ux

Disasters Don't Plan Ahead, but You Can

Tax Tip 2018-70—5/7/2018

Hurricane Preparedness Week is May 6-12. The IRS reminds taxpayers to prepare for hurricanes and other natural disasters now. By taking a few steps before disaster strikes, taxpayers can reduce their stress when it comes time to file claims or rebuild after the catastrophic event.

Here are some things for folks to consider:

- **Update Emergency Plans**. Because a disaster can strike any time, taxpayers should review emergency plans annually. Personal and business situations change over time, as do preparedness needs.

- **Create Electronic Copies of Documents**. Taxpayers should keep documents – including bank statements, tax returns and insurance policies – in a safe place. Doing so is easier now that many financial institutions provide statements and documents electronically. Even if original documents are available only on paper, people should scan them into an electronic format and store them on DVD, CD or cloud storage.

Document Valuables. It's a good idea for people to photograph or videotape the contents of any home, especially items of higher value. Documenting these items ahead of time will make it easier to claim insurance and tax benefits after a disaster strikes. The IRS has a disaster loss workbook which can help taxpayers compile a room-by-room list of belongings. Photographs can help prove the fair market value of items for insurance and casualty loss claims.

IRS is Ready to Help. In the case of a federally declared disaster, affected taxpayers can call 866-562-5227 to speak with an IRS specialist trained to handle disaster-related issues. Taxpayers can request copies of previously filed tax returns and attachments, including Forms W-2, by filing Form 4506. They can also order transcripts showing most line items through Get Transcript on IRS.gov by calling 800-908-9946 or by using 4506T-EZ, or 4506-T.

More information about Hurricane Preparedness Week is on the National Weather Service website.

Additional IRS Resources:

Preparing for a Disaster
Publication 584-B, Business Casualty, Disaster, and Theft Loss Workbook
Publication 547, Casualties, Disasters, and Thefts
Publication 583, Starting a Business and Keeping Records

FROM THE TAX FRONT

For Small Business Week, IRS highlights key business tax topics

WASHINGTON — In recognition of National Small Business Week, April 29 to May 5, the Internal Revenue Service is highlighting several resources to help small business owners and self-employed individuals understand and meet their tax obligations. The new tax law changes enacted in December 2017 make it especially important for these groups to know about new provisions affecting them.

During this week, the IRS will highlight various products including:

- A series of news releases on various topics including the sharing economy, home office deduction, cybersecurity and the Work Opportunity Tax Credit.

Tax tips about business provisions under the new tax reform law. Topics will include tax law changes to depreciation rules and the employer credit for family and medical leave and how it benefits employers. Tax tips are written in plain language and can be subscribed to using the IRS's Tax Tips email-subscription program.

- Information for small businesses is also available through IRS social media channels including tax tips and other resources. Stay informed following the hashtag #IRSsmallbiz and help us spread these messages by sharing the @IRSnews, @IRSTaxPros and @IRSenEspanol tweets.

Other small business resources

The IRS encourages business owners to check out other webinars on the IRS video portal. The portal has presentations on a variety of small business topics. Business owners may also be interested in these sites:

Small Business and Self-Employed Tax Center — an online resource featuring links to a variety of useful tools, including Small Business Taxes: The Virtual Workshop, a downloadable tax calendar and common forms with instructions. The Center provides help on everything from how to get an Employer Identification Number online to information and tips about IRS audits.

Self-Employed Individual Tax Center — a resource for sole proprietors and others who are in business for themselves. This site has many useful tips and references to tax rules a self-employed person may need to know.

IRS YouTube Video Channel — watch videos for small businesses on the Small Business playlist.

Online Learning and Educational Products — a page with tools to help taxpayers learn about taxes on their own time and at their own pace. For example, the IRS Tax Calendar for Businesses and Self-Employed has important tax dates for businesses.

E-News for Small Businesses — a free electronic mail service that offers tax information for small business owners and self-employed individuals, including reminders, tips and special announcements.

IRS Uses YouTube to Provide Tax Information to Small Business Owners

During National Small Business Week – and any time of the year – small business owners can visit the IRS channel to watch a series of videos that can help them navigate tax topics that affect their business.

The small business playlist on the official IRS YouTube channel features several videos that might be short, but that pack in a lot of helpful information. The videos walk business owners through topics such as:

Estimated Taxes – covers who needs to make quarterly estimated tax payments and how people can make them.

Some Taxpayers Can File their Employment Taxes Annually – discusses when and how to report to the IRS employment taxes withheld from employee paychecks

How to Voluntarily Correct the Classification of Your Workers – covers how to reclassify workers as employees who were initially considered independent contractors.

Your Taxes in the Sharing Economy – reviews the tax responsibilities of people who participate in the gig economy, including people who use an app or website to rent out a spare room or offer rides in their car.

YouTube is just one social media website the IRS uses to share important information about taxes. Visit the Social Media page on IRS.gov to connect with the IRS through other sites and apps.

FROM THE TAX FRONT

IR-2018-117– May 8, 2018

Many tax-exempt organizations must file information returns by May 15; do not include Social Security numbers or personal data

WASHINGTON — The Internal Revenue Service reminded certain tax-exempt organizations that the Tuesday, May 15 filing deadline for Form 990-series information returns is fast approaching.

Form 990-series information returns and notices are normally due on the 15th day of the fifth month after an organization's tax-year ends. Many organizations use the calendar year as their tax year, making May 15, 2018 the deadline to file for 2017.

No Social Security numbers on Forms 990

The IRS generally does not ask organizations for Social Security Numbers and cautions filers not to provide them on Form 990. By law, both the IRS and most tax-exempt organizations are required to publicly disclose most parts of Form 990 filings, including schedules and attachments. Public release of SSNs and other personally identifiable information about donors, clients or benefactors could give rise to identity theft. More information on this can be found in the "general instructions" section of the Instructions for Form 990, Return of Organization Exempt from Income Tax.

The IRS also urges tax-exempt organizations to file forms electronically to reduce the risk of inadvertently including SSNs or other unnecessary personal information. Electronic filing also provides acknowledgement that the IRS has received the return and reduces normal processing time, making compliance with reporting and disclosure requirements easier.

Tax-exempt forms that must be made public by the IRS are clearly marked "Open to Public Inspection" in the top right corner of the first page. These include Form 990, Form 990-EZ, Form 990-PF and others.

Forms to file

Small tax-exempt organizations with average annual gross receipts of $50,000 or less may file an electronic notice called a Form 990-N (e-Postcard). This form requires only a few basic pieces of information. Tax-exempt organizations with average annual gross receipts above $50,000 must file a Form 990 or 990-EZ, depending on their receipts and assets. Private foundations must file Form 990-PF.

Organizations that need additional time to file a Form 990, 990-EZ or 990-PF may obtain an automatic six-month extension. Use Form 8868, Application for Extension of Time to File an Exempt Organization Return, to request an extension. The request must be filed by the due date of the return. Note that no extension is available for filing the Form 990-N (e-Postcard).

Many organizations risk loss of tax-exempt status

By law, organizations that fail to file annual reports for three consecutive years will see their federal tax exemptions automatically revoked as of the due date of the third year for which they are required to file an annual report. The Pension Protection Act of 2006 mandates that most tax-exempt organizations file annual Form 990-series information returns or notices with the IRS. The law, which went into effect at the beginning of 2007, also imposed a new annual filing requirement for small organizations. Churches and church-related organizations are not required to file annual reports.

Check tax-exempt status online

The IRS publishes a list of organizations identified as having automatically lost tax-exempt status for failing to file annual reports for three consecutive years. Organizations that have had their exemptions automatically revoked can apply for reinstatement of their tax-exempt status and pay the appropriate user fee.

The IRS now offers an enhanced, mobile friendly search tool, called Tax Exempt Organization Search (TEOS). TEOS provides easy access to publicly available information about exempt organizations. Users can find key information about the federal tax status and filings of certain tax-exempt organizations, including whether organizations have had their federal tax exemptions automatically revoked and if an organization is eligible to receive tax-deductible contributions.

PICTURES FROM OUR DECEMBER 2017 HOLIDAY PARTY WITH THE BLANKETY-BLANK GROUP


The Cast


Watching the Show


Outgoing 2017 Board


2018 Board taking the Oath of Office


Priscilla Lerma receiving the 2017CSTC Member of the Year Award

California Society of Tax Consultants
Inland Empire Chapter

c/o Hilde Morrow
2058 N Mills Ave PMB 225
Claremont CA 91711

Address Service Requested

Dinner Meeting

May 16, 2018

Location: DoubleTree Hotel, Claremont

2018
SOCIETY CALENDAR
UPCOMING EVENTS

May 4 & 5, 2018	**Society Board Meeting** **Orange, CA**
June 10, 11, 12, 13, 2018	**Summer Symposium** **Reno, NV**

CSTC CLASSROOM 60 HOUR COURSE

Starting date: TBA

Instructor: David Eastis

SOCIETY MEMBER BENEFIT

Members who bring in (refer) a new member will receive a $25 credit towards (their) membership renewal the following year. The referring member's name must be stated on the new member's application.

(effective date May 2, 2014)

California Society of Tax Consultants

The address for the Society Office is:
65 Enterprise
Aliso Viejo, CA 92656
Phone: 949.715.4192
Fax: 949.715.6931

CTEC CONTINUING EDUCATION REQUIREMENTS?

Twenty (20) hours of CTEC-approved continuing education (10 hours of Federal Tax Law, 3 hours Tax Updates, 2 hours Ethics and 5 hours CA). This education must be taken from a CTEC approved curriculum provider and completed by October 31 of each year. CSTC meetings and workshops are approved curriculum providers.