



California Society  
of Tax Consultants

# CSTC Reporter e-Newsletter

CSTC Newsletter

April 2026

## In This Issue...

From the CSTC President • Registration is **OPEN** for the 2026 Summer Symposium • Time to Vote! • 2026 Member of the Year Nominations are Open! • Classified Ads - A Member Benefit • Upcoming Chapter Events • Welcome New CSTC Members • Legislative Advocacy • News from the IRS • Join CSTC! • CSTC Member Benefits • Thank You to our 2025 Summer Symposium Sponsors and Exhibitors • Follow CSTC on Social Media!

## From the CSTC President

How do I know it's almost Tax Day?

- I left my office mid-day to go to an out-of-office meeting and walking outside into the sun felt like the climax of Nosferatu.
- We've put a "yes, we know we're behind schedule" message on our client portal.
- The stress shopping has reached epic proportions, but at least my cats have a lot of fun boxes to sit in.

But this is the homestretch, friends!

Rather than hit you with a bunch of cliché platitudes (if you're anything like me, the utterance of a "hang in there!" or "you're so close now!" will occasionally send you into a blind rage), I figured I would share some of my favorite "stress management" techniques for the last push of the season.

- If I'm feeling particularly wound up, I find that revisiting favorite songs of my youth can help me blow off steam. Nothing takes the edge off a long day at the office like screaming along to an old Soundgarden hit.
- Three words: bad reality television. The fact that Love is Blind seasons align with peak tax season is one that I celebrate every year. Sometimes what you really need is to shut your brain off for a few hours and nothing delivers like reality TV.
- If I'm feeling like watching something that won't melt my brain, I watch Mad Men...again. Or CSI Vegas...again. Or Criminal Minds...again.
- I shop. More than I should. I might have taken a break from the writing of this message to do a Bing (YES I SAID BING) search on available 1960s Corsairs. You know, totally practical things. But let's be real, shopping for practical things doesn't quite scratch the itch.

The truth is that we are so close now. There's a lot of ground to cover between now and then, but we'll be on the other side soon enough (or maybe too soon).

Until then, stay cool and stay calm. We're all in this together.

Shannon Hall  
CSTC President

---



**FOLLOW THE YELLOW BRICK ROAD**  
TO THE BEST CE EVENT OF THE YEAR  
SILVER LEGACY RESORT CASINO • RENO, NV

**REGISTRATION IS OPEN FOR THE 2026 SUMMER SYMPOSIUM!**

**JUNE 7 - 10, 2026**  
**SILVER LEGACY RESORT CASINO**  
**RENO, NEVADA**

[CLICK HERE TO LEARN MORE AND REGISTER TODAY!](#)

### Summer Symposium Schedule-at-a-Glance

	<u><a href="#">Sunday, June 7, 2026</a></u>
3:00 PM to 5:00 PM	Registration Open; Exhibitor Set-up
5:30 PM to 6:00 PM	Welcome Reception for First-Time Attendees

6:00 PM to 7:00 PM	Welcome Reception (light appetizers will be served) This event is family-friendly. (Included with full registration. Guest registration for this event is \$125)
	<b><u>Monday, June 8, 2026</u></b>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	<b>Breakfast Keynote Session: IRS Keynote Session</b> <b>Speaker: TBA</b>
9:15 AM to 10:05 AM	Breakout Sessions:
	<b>Track One: The Entity – Basics of Business Returns</b> <b>Speaker: Shannon Hall, EA</b>
	<b>Track Two: There’s No Place Like College: Tax Planning for Education</b> <b>Speaker: Brad Messner, EA</b>
	<b>Track Three: QBI Deduction Refresher &amp; Update!</b> <b>Speaker: Jane Ryder, EA, CPA</b>
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	<b>Track One: 2026 Digital Asset Tax Update</b> <b>Speaker: Matt Metras, EA</b>
	<b>Track Two: You think you know California Residency? Sure, and Dorothy thought she was in Kansas</b> <b>Speaker: Patricia Barron, EA</b>
	<b>Track Three: Navigating Rentals &amp; Passive Activity Losses</b> <b>Speaker: Natalie Kolodij, EA, CRETS</b>
12:00 PM to 1:20 PM	<b><i>Lunch and Learn:</i></b>  <b><i>No CE Offered for this Course</i></b>
1:20 PM to 3:00 PM	Breakout Sessions:

	<b>Track One: Short-Term Rentals: Fact from Fiction</b> <b>Speaker: Natalie Kolodij, EA, CRETS</b>
	<b>Track Two: Practical Digital Asset Reporting - How to make the most of software</b> <b>Speaker: Matt Metras, EA</b>
	<b>Track Three: California Individual Tax Update</b> <b>Speaker: Patricia Barron, EA</b>
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	<b>General Session: Individual Tax Update</b> <b>Speaker: Tom Gorczynski, EA, USTCP</b>
5:00 PM to 6:30 PM	Reception with Exhibitors
	<a href="#"><u>Tuesday, June 9, 2026</u></a>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	<b>FTB Breakfast Keynote: California Tax Updates</b> <b>Speaker: Victoria A Ramirez, CPA, Advocate Technical Advisor, Taxpayers' Rights Advocate's Office</b>
9:15 AM to 10:05 AM	Breakout Sessions:
	<b>Track One: Click Your Heels and Automate: AI for Estimated Tax Projections</b> <b>Speaker: Brad Messner, EA</b>
	<b>Track Two: Dependency In-Depth</b> <b>Speaker: Shannon Hall, EA</b>
	<b>Track Three: Taming the Flying Monkeys: Effectively Responding to IRS Notices</b> <b>Speaker: Josh Youngblood, EA</b>
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	<b>Track One: Filing Status: Rules and Planning</b> <b>Speaker: Tom Gorczynski, EA, USTCP</b>
	<b>Track Two: There's No Place Like Relief: Understanding Innocent Spouse Rules</b> <b>Speaker: Josh Youngblood, EA</b>

	<b>Track Three: Tax &amp; Compliance for Not-for-Profit Organizations Part One</b> <b>Speaker: Veronica Marelli, EA</b>
12:00 PM to 1:20 PM	<b>2026 Annual Business Meeting and Awards Ceremony Luncheon</b> <b>(Included with registration)</b>
1:20 PM to 3:00 PM	Breakout Sessions:
	<b>Track One: Tax &amp; Compliance for Not-for-Profit Organizations Part Two</b> <b>Speaker: Veronica Marelli, EA</b>
	<b>Track Two: Sale of A Residence</b> <b>Speaker: Tom Gorczynski, EA, USTCP</b>
	<b>Track Three: Farming: Alfalfa to Zebras to Deadly Poppies</b> <b>Speaker: Brad Messner, EA</b>
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	<b>General Session: Business Tax Update</b> <b>Speaker: Jane Ryder, EA, CPA</b>
	<a href="#"><u>Wednesday, June 10, 2026</u></a>
7:00 AM to 5:00 PM	Registration and Exhibits
8:20 AM to 10:05 AM	<b>Breakfast Keynote Session: Closing a Practice</b> <b>Speaker: Tom Gorczynski, EA, USTCP, Josh Youngblood, EA, and Shannon Hall, EA</b>
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	<b>Track One: GIG Economy Tax Compliance, Tax Savings and Form 1099-K</b> <b>Speaker: Jane Ryder, EA, CPA</b>
	<b>Track Two: Estate Planning After the OBBBA</b> <b>Speaker: Frank Acuña, Attorney at Law</b>
	<b>Track Three: Summary Judgement: Lessons Learned from the US Tax Court</b> <b>Speaker: Matt Metras, EA</b>
12:00 PM to 1:20 PM	<i>Lunch and Learn</i>  <i>No CE Offered for this Course</i>

1:20 PM to 3:00 PM	<b>General Session: Stump the Tax Experts</b> <b>Speaker: Speaker Panel</b>
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	<b>General Session: Assisting Clients with Estate Planning Needs - Ethically!</b> <b>Speaker: Frank Acuña, Attorney at Law</b>
5:15 PM	Grand Prize Drawing

[CLICK HERE TO LEARN MORE AND REGISTER TODAY!](#)

Engage with tax professionals, industry experts, and government leaders for three days of valuable insights, networking, and professional development. More details to come – mark your calendar!

---

## Time to Vote!

It is time to vote for the 2026 CSTC Board of Directors and on proposed Bylaws changes. Please click the link to submit your official ballot. The final ballot will be presented at the Annual Business Meeting on June 9, 2026, during the Summer Symposium. Please [click here](#) to learn more about the 2026 Summer Symposium and to register today!

All votes must be submitted through the online ballot by **Friday, May 1, 2026 at midnight**.

[Click here](#) to fill out the official CSTC 2026 ballot. **Ballot is open to CSTC members only.**

---

## 2026 Member of the Year Nominations are Open!

At the heart of CSTC are the individuals who generously dedicate their time to further our mission. We are now seeking nominations for the **Member of the Year Award**, CSTC's highest honor, which recognizes an outstanding individual for their extraordinary efforts in supporting fellow tax professionals and advancing CSTC.

CSTC members are invited to nominate deserving individuals, and a panel of judges will select the final recipient. The award will be presented at the CSTC Annual Business Meeting on **Tuesday, June 9, 2026**, at the [Summer Symposium in Reno, Nevada](#).

We encourage you to submit your nominations and help us recognize those who make a meaningful impact! **The deadline to fill out this form is Friday, May 1, 2026 at midnight.**

[Click here](#) to fill out the online Member of the Year nomination form. You will need to complete this form for each person you would like to nominate. **Member of the Year form is open to CSTC members only.**

---



## CSTC Classified Ads - A Member Benefit

Want to advertise with CSTC?

CSTC Members are welcome to advertise in the CSTC Reporter. The member rate is \$45 per quarter, per ad, with a maximum of 50 words. If you wish to place an ad in more than one category, please submit a separate form for each category.

Submissions are limited to 50 words and may include hyperlinks for additional information. Ad content will only be reviewed after confirmed receipt of payment. The CSTC Reporter is emailed on the first business day of each month to 55,000+ contacts. Advertisement categories include:

- Help Wanted
- Position Wanted
- Office Space Needed
- Office Space Available
- Practice for Sale
- Looking to Buy a Practice
- Furniture/Equipment for Sale
- Furniture/Equipment Needed

Submissions will be reviewed by editors for approval by the 15th of the month. If approved, the ad will be included in the Reporter for the remainder of the quarter. Submissions received after the 15th of the month will be reviewed the following month.

### Quarter Dates:

- **Quarter One:** January, February, March
- **Quarter Two:** April, May, June
- **Quarter Three:** July, August, September
- **Quarter Four:** October, November, December

All submitted advertisements are subject to acceptance at the sole discretion of the CSTC. If an advertisement is not accepted, a refund will be issued.

[CLICK HERE](#) to submit your classified ad!

---

## Upcoming CSTC Chapter Events

**April 3, 2026**

Round Table

Temecula Valley Chapter In-Person Meeting

1 Federal Law hour(s) (Topics covering existing tax law)

[Click here](#) to learn more and register.

[Click here](#) to view the CSTC calendar

---

## Welcome New CSTC Members!

**Vincent Alexander**

**San Diego-North County Chapter**

**Derek Bailey**

**Greater Long Beach Chapter**

**Craig Neblett**

**San Diego Chapter**

**Terence Ongtawco**

**San Diego-North County Chapter**

**Jolida Shriver**

**Orange County Chapter**

---



## Legislative Advocacy

CSTC has been the leading Association in supporting legislation to provide protection for our profession, to support our profession, and to enhance our profession. CSTC continuously leads our industry through legislative advocacy, educational opportunities, and professional inclusion.

CSTC works closely with a Legislative Consultant to keep an eye on important bills that would affect taxpayers and small

business owners.

[Please click](#) here to view the bills that CSTC is currently monitoring.

---



[4 million children have been signed up for Trump Accounts with 1 million claiming the \\$1,000 pilot program contribution](#)

IR-2026-42, March 31, 2026 – The Internal Revenue Service today announced that taxpayers have signed up more than four million children for tax-favored Trump Accounts, of which more than one million children are covered by elections for the \$1,000 Trump Accounts pilot program contribution.

[Tax Time Guide: Steps taxpayers can take now to resolve tax issues and stay on track](#)

IR-2026-41, March 26, 2026 – Taxpayers who owe taxes or have not yet filed can benefit from acting early.

[IRS announces special Saturday hours at Taxpayer Assistance Centers across the nation to provide face-to-face help](#)

IR-2026-40, March 25, 2026 – The Internal Revenue Service announced that special Saturday hours will be available over the next few months at select Taxpayer Assistance Centers across the country.

[IRS to host webinar on One, Big, Beautiful Bill business tax provisions tomorrow](#)

IR-2026-39, March 23, 2026 – The IRS invites tax professionals and business stakeholders to attend a webinar on Tuesday, March 24, 2026, at 2:00 p.m. Eastern. Tax professionals can earn two continuing education credits for attending the webinar titled: Understanding the One, Big, Beautiful Bill: Business Tax Provisions.

[Free options and resources for preparing and filing taxes in 2026](#)

IR-2026-38, March 20, 2026 – The Internal Revenue Service reminds taxpayers who still need to file their 2025 federal tax returns that free options and resources are available on IRS.gov.

[Time is running out to claim \\$1.2 billion in refunds for tax year 2022; taxpayers face April 15 deadline](#)

IR-2026-37, March 20, 2026 — The Internal Revenue Service today announced that over 1.3 million people across the nation have unclaimed refunds for tax year 2022 and face an April 15 deadline to submit their tax returns.

[Update on IRS Commissioner position](#)

IR-2026-36, March 13, 2026 – Consistent with applicable law and longstanding practice, the Secretary of the Treasury oversees the operations of all Treasury offices and bureaus, including the Internal Revenue Service. Secretary Scott Bessent's service as Acting Commissioner of the IRS under the Federal Vacancies Reform Act has expired, and he has not served in that capacity since that time.

[Updated Tax Withholding Estimator lets millions of taxpayers take One, Big, Beautiful Bill changes into account when calculating their withholding](#)

IR-2026-35, March 12, 2026 – The Internal Revenue Service recently unveiled enhancements to the IRS Tax Withholding Estimator to reflect changes to credits and deductions under the One, Big, Beautiful Bill, including no tax on tips, no tax on overtime, and other tax benefits.

[2026 IRS Nationwide Tax Forum registration is now open](#)

IR-2026-34, March 6, 2026 – The Internal Revenue Service today announced that registration is now open for the 2026 IRS Nationwide Tax Forum, the agency’s largest annual outreach event designed specifically for the tax professional community.

[Treasury, IRS issue proposed regulations on how to open initial Trump Accounts under the One, Big, Beautiful Bill](#)

IR-2026-33, March 6, 2026 –The Department of the Treasury and the Internal Revenue Service today issued proposed regulations providing general requirements for Trump Accounts, certain definitions relating to Trump Accounts, election rules to open an initial Trump Account by an authorized individual for an eligible individual, and rules for who is the responsible party for the initial Trump Account once the account has been opened.

[IRS announces extended weekday and Saturday hours at Taxpayer Assistance Centers through spring](#)

IR-2026-32, March 6, 2026 – The Internal Revenue Service today announced that it is extending weekly office hours at more than 200 Taxpayer Assistance Centers nationwide to provide taxpayers with additional time to receive in-person assistance during the filing season.

[Treasury, IRS issue proposed regulations for Trump Accounts contribution pilot program, Treasury Department to deposit \\$1,000 into the account of each eligible child](#)

IR-2026-31, March 6, 2026 – The Department of the Treasury and the Internal Revenue Service today issued proposed regulations providing guidance regarding the pilot program for Trump Accounts, which are a new type of individual retirement account for eligible children.

[Dirty Dozen tax scams for 2026: IRS reminds taxpayers to watch out for dangerous threats](#)

IR-2026-30, March 5, 2026 – The Internal Revenue Service today announced its annual Dirty Dozen list of tax scams for 2026 that threaten the tax and financial information of taxpayers, businesses, and tax professionals.

[Treasury, IRS issue proposed regulations to make it easier for digital asset brokers to provide 1099-DA statements electronically](#)

IR-2026-29, March 5, 2026 – The Department of the Treasury and the Internal Revenue Service today issued proposed regulations to make it easier for digital asset brokers to provide statements electronically to customers, rather than sending paper copies.

[IRS published schedule taxpayers will use to claim deductions on no tax on tips, no tax on overtime, no tax on car loans, no tax on seniors](#)

IR-2026-28, March 2, 2026 – The Internal Revenue Service published, for tax year 2025, a new schedule that taxpayers will use to realize important tax benefits of the One, Big, Beautiful Bill, including no tax on tips, no tax on overtime, no tax on car loans, and no tax on seniors.

[News release and fact sheet archive](#)

Find previous year news releases and fact sheets from 1997 through last month.

---

**Join the California Society of Tax Consultants!**

[Click here to fill out an online application.](#)

CSTC advances professionalism within the tax industry by:

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

---

**FOLLOW CSTC ON SOCIAL MEDIA!**



## CSTC Member Benefits



*Our greatest Member benefits are the relationships you will build with other Members*



The CSTC Member Listserv is an email address that forwards your email message to all who subscribe.

The CSTC Listserv is a great way to communicate quickly and easily with the subscribed members regarding business-related questions and requests for assistance.



CSTC members have access to benefits such as free payroll processing services for your tax practice, and the opportunity to earn new revenue through their flexible partnership options.

### **\*\*NEW MEMBER BENEFIT\*\***



CSTC members receive \$30 off every live seminar and 8-hour on-demand webinar that Brass Tax offers every year! That means Tax Toolbox, Update, and the new Summer Seminar are all \$30 off! This new benefit rolls out just in time for discounts on the upcoming Tax Toolbox seminar starting September 16th in Orange County. The 2025 Toolbox focuses on tax planning and strategies for rentals and also includes 2 hours of Ethics.



Wolters Kluwer: Discounts on Tax, Accounting & Audit Resources, Software, Information & Services.



CSTC members receive the TaxBook WebLibrary at a special price. Other Member Benefits Include:

Savings on all Society Educational Events / Savings on Contact, Correspondence & Self Study Education / Savings with member specialty CSTC Connects (previously yellow Pages) list / Savings with E&O Insurance, plus specialty coverage relevant to your profession / Online CSTC Find-a-Tax Consultant search to help promote your business! / CSTC Member Listserv



If you are interested in buying or selling a practice, contact us today! ATB is operated by Enrolled Agents ensuring a complete understanding of our profession. Please give us a call at (855) 428-2225 or visit us online at [www.ATBCAL.com](http://www.ATBCAL.com) for more information and to view our current listings. CA DRE 02002824



While Verifyle Pro is no longer offered for free, your CSTC membership gives you the ability to subscribe to Verifyle Gold for just \$15 per month (32% off the retail price), or Verifyle Platinum for just \$22 per month (55% off the retail price).



Office Depot has partnered with us to provide exclusive savings in-store and online, plus fantastic additional benefits. This program is all about providing preferred pricing to our clubs, and the savings extend to almost every item.

Savings include 20% to 55% off item office supply core list, 20% to 55% off retail on cleaning & break room items, 10% off branded; 20% off private brand ink & toner core list, Average 10% off retail on 200 technology core items, Free next-day shipping on orders of \$50 or more, and SIGNIFICANT savings on copy & print. Become a CSTC member to sign up for our Office Depot Small Business Savings Program, administered by Exceleerate America.

THANK YOU TO THE 2025 SUMMER SYMPOSIUM SPONSORS AND EXHIBITORS

SILVER SPONSOR



BRONZE SPONSOR



BADGE SPONSOR



LUNCH & LEARN



AUDIT LOUNGE: AI AFTER DARK



EXHIBITOR RECEPTION (SPECIALTY DRINK)



CONFERENCE TOTE BAG INSERT



EXHIBITORS

