



California Society
of Tax Consultants

CSTC Reporter e-Newsletter

CSTC Newsletter

February 2026

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From the CSTC President

Well, it's here. Tax season comes whether we're ready or not, but hopefully by this time you have at least a pretty solid handle on the new OB3 deductions and the new California conformity date. If you still have questions, many of the local chapters will be hosting breakfast roundtable meetings where you can bring your toughest tax issues and work through them with a little help from your friends. There is so much knowledge in this organization, and these meetings are a great way to share your expertise and get insight from others.

This time of year most of us are focused on finishing as many returns as we can before that April deadline hits and aren't really thinking about continuing education for the year. But, if you want to get the best deal on registration for THE education event of the summer, early bird registration is open for the CSTC Summer Symposium. The lineup this year is amazing (as always).

I want to share some information about our Symposium Memorial Scholarship. We know sometimes the cost of attending a destination CE event can present a barrier, particularly if you are in the early stages of your tax career. We wanted to find a way to remove that barrier for individuals who want to attend Symposium but need a little assistance. The Summer Symposium Memorial Scholarship was created with that goal in mind. We named the scholarship for two CSTC members who made a tremendous impact on our organization's education.

The first is Nikki LeBrun. Nikki held just about every office that was available at both the chapter and Society level, but she is perhaps best known for her time serving as the chair of the Summer Symposium. For many years she worked tirelessly to make sure that the flagship event was the best it could possibly be. One of our scholarships is in Nikki's name.

We also wanted to honor Eva Rosenberg, perhaps better known as "Tax Mama." Eva was a regular speaker at Symposium and she guided many of our members to success taking the Enrolled Agent exam with her comprehensive prep course. She had

the rare combination of a brilliant mind and a warm heart and she was an inspiration to so many in our industry. Our second scholarship is in Eva's name.

If you are interested in applying for one of our scholarships, you can [click here](#) and submit your application.

If you would like to make a contribution to the scholarship fund, you can do so here.

As we move into the frenzy of tax season I just want to give you a gentle reminder to make time to take care of yourself during these next few months. Set your boundaries and stick to them. And remember, extensions exist for a reason...

Respectfully submitted,

Shannon Hall
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>Sunday, June 7, 2026</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)
	<u>Monday, June 8, 2026</u>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	Breakfast Keynote Session: IRS Keynote Session Speaker: TBA
9:15 AM to 10:05 AM	Breakout Sessions:
	Track One: The Entity – Basics of Business Returns Speaker: Shannon Hall, EA
	Track Two: There's No Place Like College: Tax Planning for Education Speaker: Brad Messner, EA
	Track Three: QBI Deduction Refresher & Update! Speaker: Jane Ryder, EA, CPA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: 2026 Digital Asset Tax Update Speaker: Matt Metras, EA
	Track Two: You think you know California Residency? Sure, and Dorothy thought she was in Kansas Speaker: Patricia Barron, EA
	Track Three: Navigating Rentals & Passive Activity Losses Speaker: Natalie Kolodij, EA, CRETS

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	Breakout Sessions:
	Track One: Short-Term Rentals: Fact from Fiction Speaker: Natalie Kolodij, EA, CRETS
	Track Two: Practical Digital Asset Reporting - How to make the most of software Speaker: Matt Metras, EA
	Track Three: California Individual Tax Update Speaker: Patricia Barron, EA
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Individual Tax Update Speaker: Tom Gorczynski, EA, USTCP
5:00 PM to 6:30 PM	Reception with Exhibitors
	<u>Tuesday, June 9, 2026</u>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	Breakfast Keynote: FTB Keynote Speaker: TBA
9:15 AM to 10:05 AM	Breakout Sessions:
	Track One: Click Your Heels and Automate: AI for Estimated Tax Projections Speaker: Brad Messner, EA
	Track Two: Dependency In-Depth Speaker: Shannon Hall, EA
	Track Three: Taming the Flying Monkeys: Effectively Responding to IRS Notices Speaker: Josh Youngblood, EA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: Filing Status: Rules and Planning Speaker: Tom Gorczynski, EA, USTCP

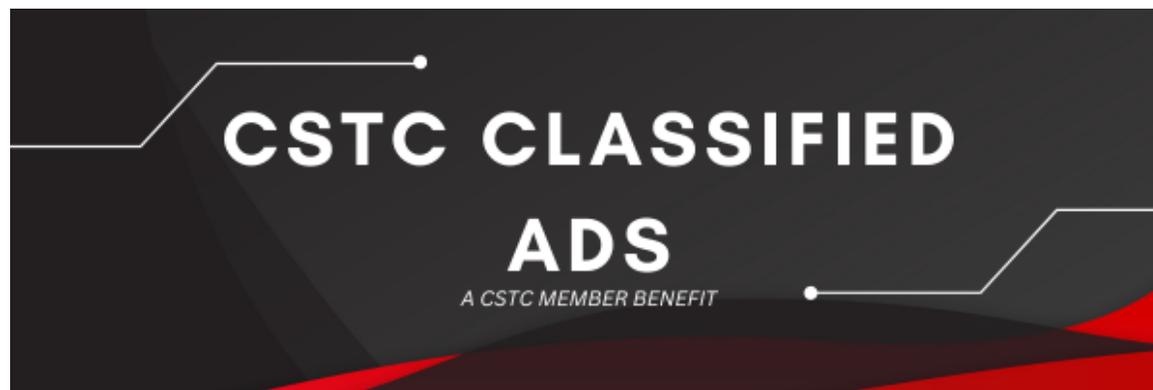
	Track Two: There's No Place Like Relief: Understanding Innocent Spouse Rules Speaker: Josh Youngblood, EA
	Track Three: Tax & Compliance for Not-for-Profit Organizations Part One Speaker: Veronica Marelli, EA
12:00 PM to 1:20 PM	2026 Annual Business Meeting and Awards Ceremony Luncheon (Included with registration)
1:20 PM to 3:00 PM	Breakout Sessions:
	Track One: Tax & Compliance for Not-for-Profit Organizations Part Two Speaker: Veronica Marelli, EA
	Track Two: Sale of A Residence Speaker: Tom Gorczynski, EA, USTCP
	Track Three: Farming: Alfalfa to Zebras to Deadly Poppies Speaker: Brad Messner, EA
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Business Tax Update Speaker: Jane Ryder, EA, CPA
	<u>Wednesday, June 10, 2026</u>
7:00 AM to 5:00 PM	Registration and Exhibits
8:20 AM to 10:05 AM	Breakfast Keynote Session: Closing a Practice Speaker: Tom Gorczynski, EA, USTCP, Josh Youngblood, EA, and Shannon Hall, EA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: GIG Economy Tax Compliance, Tax Savings and Form 1099-K Speaker: Jane Ryder, EA, CPA
	Track Two: Estate Planning After the OBBBA Speaker: Frank Acuña, Attorney at Law
	Track Three: Summary Judgement: Lessons Learned from the US Tax Court Speaker: Matt Metras, EA
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	General Session: Stump the Tax Experts Speaker: Speaker Panel
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Assisting Clients with Estate Planning Needs - Ethically! Speaker: Frank Acuña, Attorney at Law
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!

Scholarships for the 2026 Summer Symposium are be available to CSTC members. [Click here to learn more.](#)



CSTC Classified Ads - A Member Benefit



Help Wanted

Experienced Tax Professional wanted. Flexible sched, f/t or p/t. Competitive comp+benefits+bonuses! Centrally located in San Diego, professional yet comfortable office. Hoping for a long-term employee who can grow with our business. Equity interest may be available for employee who wants to take on greater role. Please contact Robert Freidson at Robert@sandiegotaxprofessionals.com for more information.

Office Space Available

CPA near John Wayne Airport has private office with services for rent. Per Diem assignments are available. Prefer CPA seeking to grow existing practice. Near term transition also considered. Contact Philip Becker at celiaso@aol.com for more information.



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

February 1, 2026

Tax Season Sunday Q&A Brunch

Orange County Chapter In-Person Meeting

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

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

February 4, 2026

Tax Season Last Minute Updates to IRS

San Francisco Bay Chapter Virtual Meeting

2 Federal Tax Update hour(s) (Topics covering new tax law)

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

February 8, 2026

Round Table Discussion 2025 Tax Issues/ Resolutions - Bring Your Tax Questions and Taxation Issues

Greater Long Beach Chapter In-Person Meeting

3 California hour(s) (Topics covering California law issues)

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

February 15, 2026

RoundTable Discussion on Federal Updates

Central Valley Chapter In-Person Meeting

3 Federal Tax Update hour(s) (Topics covering new tax law)

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

Tax Season Sunday Q&A Brunch

Orange County Chapter In-Person Meeting

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

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

February 20, 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.

February 22, 2026

Round Table Discussion 2025 Tax Issues/ Resolutions - Bring Your Tax Questions and Taxation Issues

Greater Long Beach Chapter In-Person Meeting

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

1 Federal Tax Update hour(s) (Topics covering new tax law)

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

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

Welcome New CSTC Members!

Nate Abba

Inland Empire Chapter

Daisy Blanks

Sacramento Chapter

Claudia Chacon

Central Valley Chapter

Heriberto Ebarle
Greater Long Beach Chapter

Emma Garcia de Ramirez
San Francisco Bay Chapter

Yessenia Guerra
Greater Long Beach Chapter

EJ Hawkins
Member-at-Large

An Nguyen
San Jose Chapter

Sheryl Wiggins-Barros
San Jose 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.



NEWS FROM THE IRS

[IRS announces 2026 Tax Counseling for the Elderly and Volunteer Income Tax Assistance Program Grants](#)

IR-2026-19, Jan. 30, 2026 – The Internal Revenue Service announced today the award of \$53 million in Tax Counseling for the Elderly and Volunteer Income Tax Assistance grants to organizations that provide federal tax return preparation at no cost.

[IRS requests applications for 2026 ETAAC membership](#)

IR-2026-18, Jan. 29, 2026 – The Internal Revenue Service is accepting applications for the Electronic Tax Administration Advisory Committee through Feb. 28, 2026.

[Tax Pros: Get Ready for the filing season and save time with Tax Pro Account; encourage clients to use their IRS individual online account](#)

IR-2026-17, Jan. 29, 2026 – With the 2026 filing season fast approaching, the Internal Revenue Service encourages tax professionals to help their clients prepare now by sharing helpful tips and tools available at [IRS.gov/GetReady](https://www.irs.gov/GetReady).

[Use online tools when claiming One, Big, Beautiful Bill tax advantages for families and education](#)

IR-2026-16, Jan. 28, 2026 – The Internal Revenue Service encourages taxpayers to use online tools and take a few simple steps to prepare for claiming new and expanded tax benefits under the One, Big, Beautiful Bill. Families planning to claim the Child Tax Credit, the Adoption Credit, or pay for educational expenses should review these changes before filing.

[National Taxpayer Advocate delivers Annual Report to Congress; finds taxpayer service was strong in 2025 but foresees challenges for taxpayers who encounter problems in 2026](#)

IR-2026-15, Jan. 28, 2026 – National Taxpayer Advocate Erin M. Collins today released her 2025 Annual Report to Congress, finding that taxpayers generally fared well in their dealings with the IRS in 2025 and that most taxpayers are likely to have a smooth experience in 2026.

[Taxpayer Advocate Service announces 2026 funding for Low Income Taxpayer Clinic grant recipients](#)

IR-2026-14, Jan. 27, 2026 – The Taxpayer Advocate Service today announced the award of more than \$22.5 million in matching grants to 145 qualified Low Income Taxpayer Clinics nationwide for the 2026 grant year, which runs from Jan. 1, 2026, to Dec. 31, 2026.

[IRS issues frequently asked questions about Executive Order 14247: Modernizing Payments To and From America's Bank Account](#)

IR-2026-13, Jan. 27, 2026 – The Internal Revenue Service today issued frequently asked questions to help taxpayers, businesses, and other stakeholders understand the changes under Executive Order 14247: Modernizing Payment To and From America's Bank Account.

[IRS opens 2026 filing season](#)

IR-2026-12, Jan. 26, 2026 – The Internal Revenue Service today opened the 2026 tax filing season and began accepting and processing federal individual income tax returns for tax year 2025.

[IRS joins national partners to launch EITC Awareness Day](#)

IR-2026-11, Jan. 23, 2026 – The Internal Revenue Service and partners nationwide today launched the annual Earned Income Tax Credit Awareness Day outreach campaign to help millions of eligible low-to- moderate-income, working Americans claim the Earned Income Tax Credit.

[Treasury, IRS issue FAQs to address the new deduction for qualified overtime compensation under the One, Big, Beautiful Bill](#)

IR-2026-10, Jan. 23, 2026 – The Department of the Treasury and the Internal Revenue Service today issued frequently asked questions in Fact Sheet 2026-01 related to the new deduction for qualified overtime compensation under the One, Big, Beautiful Bill.

[Treasury, IRS: Supplemental basic allowance for housing payments to members of the military are not taxable](#)

IR-2026-09, Jan. 16, 2026 – The Department of the Treasury and the Internal Revenue Service today confirmed that supplemental basic allowance for housing payments made to members of the uniformed services in Dec. 2025 are not to be

included in income by those who received the payments; they are not taxable.

[Treasury, IRS provide new safe harbor explanations for retirement plan administrators](#)

IR-2026-08, Jan. 15, 2026 — The Department of the Treasury and the Internal Revenue Service today issued guidance for certain retirement plan administrators, updating safe harbor explanations to reflect tax law changes made after Aug. 6, 2020.

[IRS Advisory Council issues Annual Report](#)

IR-2026-07, Jan. 14, 2026 — The Internal Revenue Service Advisory Council today issued its annual public report, offering recommendations to the IRS on a range of new and continuing issues in tax administration.

[Treasury, IRS issue guidance on the additional first year depreciation deduction amended as part of the One, Big, Beautiful Bill](#)

IR-2026-06, Jan. 14, 2026 — The Department of the Treasury and the Internal Revenue Service today issued Notice 2026-11 that provides taxpayers with guidance on the permanent 100% additional first year depreciation deduction for eligible depreciable property acquired after Jan. 19, 2025, provided by the One, Big, Beautiful Bill.

[Use IRS Free File to conveniently file your return at no cost](#)

IR-2026-05, Jan. 9, 2026 — IRS Free File will begin accepting individual tax returns today, giving eligible taxpayers an early opportunity to prepare and file their federal income tax returns ahead of the official start of the 2026 filing season later this month.

[IRS.gov resources can help answer questions about the One, Big, Beautiful Bill](#)

IR-2026-04, Jan. 9, 2026 — Taxpayers may be able to take advantage of new deductions that could reduce taxable income and increase refunds due to the One, Big, Beautiful Bill, passed by Congress in July 2025.

[Treasury, IRS issue proposed regulations reflecting changes from the One, Big, Beautiful Bill to the threshold for backup withholding on certain payments made through third parties](#)

IR-2026-03, Jan. 8, 2026 — The Department of the Treasury and the Internal Revenue Service today issued proposed regulations that would revise the threshold for when certain third-party settlement organizations are required to perform backup withholding to comply with changes made in the One, Big, Beautiful Bill.

[IRS announces first day of 2026 filing season; online tools and resources help with tax filing](#)

IR-2026-02, Jan. 8, 2026 – The Internal Revenue Service announced Monday, January 26, 2026, as the opening of the nation’s 2026 filing season. This year, several new tax law provisions of the One, Big, Beautiful Bill become effective, which could impact federal taxes, credits and deductions.

[Prepare to file in 2026: Get Ready for tax season with key updates, essential tips](#)

IR-2026-01, Jan. 6, 2026 – With the 2026 filing season quickly approaching, the Internal Revenue Service is urging taxpayers to take a few simple steps now to prepare for filing their 2025 federal income tax returns.

[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
-

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****

BRASS TAX
PRESENTATIONS

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.



FOLLOW CSTC ON SOCIAL MEDIA!

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 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

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BRONZE SPONSOR



BADGE SPONSOR



LUNCH & LEARN



AUDIT LOUNGE: AI AFTER DARK



EXHIBITOR RECEPTION (SPECIALTY DRINK)



CONFERENCE TOTE BAG INSERT



EXHIBITORS

