

**CALIFORNIA SOCIETY OF TAX CONSULTANTS
INLAND EMPIRE CHAPTER
Educational Dinner Meeting
Wednesday, June 20, 2018**



California Society of Tax Consultants
Inland Empire Chapter

We meet at the DoubleTree Hotel, 555 W Foothill Blvd, Claremont, CA 91711

TOPIC: The Divorce Tax Checklist: Mistakes Professionals Typically Make

IRS Program # TBA, CTEC # TBA—2 hours Federal Tax Law

This course addresses the top tax issues that attorneys typically do not cover properly when preparing divorce documents filed with the Court. The class is designed to help tax practitioners navigate the tax rules for divorce, look out for tax traps within settlement agreements, and to protect their divorcing client's interests — as well as their own practice from liability exposures. The Learning Objectives: Identify 10 key tax issues that have the most impact on divorcing couples.

SPEAKERS: Armand D'Alo, EA, CDFA, CFF and Robbin D'Alo, EA, CDFA, CLA



Robbin and Armand D'Alo have been working with families since 1983. From the complexities of taxes and estates, to marriage and divorce and everything in between, they have counseled people to achieve better outcomes in life.

Armand E. D'Alo: Armand is a Certified Financial Planner (CFP®), Certified Divorce Financial Analyst (CDFA™), and an Enrolled Agent (tax professional). He graduated in 1983 from Brigham Young University, where he earned a bachelor's degree in Finance and Family Counseling. He received his CFP® designation in 1986 from the College for Financial Planning in Denver, CO.

He is the author of the book, "The Jump of Your Life: Successfully Navigating the Free-Fall of Divorce and Other Life Traumas," and has taught classes through CPE Link on line, at BYU, UC Irvine, professional conferences, and private groups on the topics of financial planning, taxation, specific divorce tax issues as well as family and financial dynamics in divorce.

Robbin M. D'Alo: Robbin is a Certified Divorce Financial Analyst (CDFA™), an Enrolled Agent (tax professional), and a Certified Legal Assistant (CLA) with membership in NALA (National Association of Legal Assistants – the Paralegal Association)

She holds a bachelor's degree in Business Management from the University of Phoenix and has authored several articles for the Web on divorce and family law matters. She is also a notary public for the State of California.

Both Robbin and Armand are trained in mediation through courses at the National Center for Conflict Resolution (NCR), with Forrest Mosten and through Pepperdine Law School's program for mediating litigated cases. They are trained educators with the Gottman Institute. Together they produce and co-edit the blog / vlog at oaktreemediation.com and oaktreeadvisory.com and are currently producing a video series on divorce for YouTube.



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.

MEETING LOCATION

**DoubleTree Hotel
555 W Foothill Blvd
Claremont, CA 91711**

Wednesday, June 20, 2018

Sign in at **5:30 pm** — Dinner at **6:00 pm**

Speaker: **7:00 pm to 9:00 pm**

For Reservations and Menu Preference:

Phone **909.575.1066** (message phone—new #)

MEETING COST (dinner and 2 hours of education)

- **\$35 for members with reservations made on or before Saturday, June 16, 2018, 11:59 pm**
- **\$50 for non-members, walk-ins and late registrations**

To make a reservation call: 909.575.1066 (message phone) OR email: CSTC.Inland.Empire@gmail.com and pay at the event with check or cash (we are not able to accept credit cards).



== MENU ==

House Salad with Ranch and Italian dressings
Fresh Rolls and Butter

Main Menu:

- **Roasted Bone-In Chicken Leg and Thigh Meat**
Chef's Choice of Starch
Chef's Choice of Vegetable
- OR**
- **Vegetarian Lasagna Noodles layered with Mozzarella Cheese, Alfredo Sauce, and Succulent Layers of Vegetables**
Chef's Choice of Accompaniments

Coffee, Ice Tea
Chef's Choice Chocolate Dessert

If you signed up for our new 2018 permanent dinner list at the May 16, 2018 meeting, you do not have to call in your reservation. However, if you are on the list and are unable to attend please call and cancel, as a meal will be ordered for everyone on the list and we will be billed for all meals ordered. If you are not on the list and made a reservation and are unable to attend, you must cancel your reservation by **Saturday, June 16, 2018 11:59 pm otherwise you will be billed for the dinner. Be sure to call 909.575.1066.**