



California Society  
of Tax Consultants

# CSTC *Reporter* e-Newsletter

CSTC Newsletter

June 2025

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## From the CSTC President

It really is hard to believe that in just over a week we will be coming together in Reno for the 2025 Summer Symposium. This is truly one of the best educational events of the year, and I can't wait to share all of the amazing things that the committee has put together for this year.

We all know that this is a great place to get your education hours for the year. We have all of the annual requirements for CTEC renewal, and EAs and CPAs can make a pretty good dent in their required education.

But coming together for an event like Symposium isn't just about the education. This is a chance to meet and network with tax pros from all across the state and even the country! In addition to our great education sessions, we have so many opportunities to build your network.

Things kick off on Sunday night with our welcoming receptions.

If you're joining us for the first time, we invite you to head down to the First-Time Attendee Reception where you can mingle with other first-timers and meet our speakers and board members in an intimate setting.

The First-Time Attendee Reception is followed by our Welcome Reception, where you can meet all of our amazing sponsors and exhibitors and grab a cocktail (or mocktail) while you catch up with old friends and make a few new ones!

Monday night we invite you to join us in the exhibit hall for the Exhibitor Reception. Complete your bingo card while you get to know our exhibitors and learn more about the products and services that they offer. Many of our sponsors offer benefits for CSTC members, so be sure to get all the details when you stop by their tables!

New for 2025! Nope, it's not a hallucination! We are so excited to offer our very first after-hours session: AI After Dark. Drop your stuff in your room, get casual, and then head back down to the conference area to grab a drink at the bar and enjoy a bonus session on Artificial Intelligence.

On top of all of our scheduled networking opportunities and receptions, many chapters host get-togethers, and you may even run into some of the speakers at the black-jack table on your way through the casino.

This is truly a special event that is not to be missed.

If you haven't registered yet, don't worry! There's still plenty of time to sign up to join us!

See you in Reno!

Shannon Hall  
President

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## FINAL WEEK TO REGISTER FOR THE 2025 SUMMER SYMPOSIUM!

JUNE 8 - 11, 2025

SILVER LEGACY RESORT CASINO

RENO, NEVADA

The California Society of Tax Consultants, Inc. (CSTC) has been a nonprofit organization dedicated to supporting tax professionals across California since 1966 (formerly known as ISTC). CSTC is committed to providing high-quality education and exclusive member benefits. Whether you're a bookkeeper, accountant, CRTP, Enrolled Agent, or CPA, CSTC has something valuable to offer.

Our programs cover a wide range of tax topics, all approved for CTEC, EA, and CPA credit. Did you know you can earn *all* your CTEC credits for the year at the Symposium? That's right—federal, update, ethics, and California hours, all in one event!

And guess what? The popular Lunch and Learn sessions are back! Your registration includes both breakfast and lunch each day of the event.

With an outstanding lineup of speakers and topics, there’s something for everyone, whether you’re a beginner or a seasoned tax preparer.

We can’t wait to see you in Reno! The CSTC Summer Tax Symposium is an event you won’t want to miss!

CLICK HERE TO LEARN MORE AND REGISTER!

Summer Symposium Schedule-at-a-Glance

	<a href="#">Sunday, June 8, 2025</a>
3:00 PM to 5:00 PM	Registration Open; Exhibitor Set-up
5:00 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 is \$95)
	<a href="#">Monday, June 9, 2025</a>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	<b>Breakfast Keynote Session: IRS Hot Topics: What’s New, What’s Changing, and What to Watch</b> <b>Speakers: Tom Gorczynski, EA, USTCP, Ryan Reichert, EA, CFP, Jane Ryder, EA, CPA, and Claudia Stanley, CPA, EA</b>
9:15 AM to 10:05 AM	Breakout Sessions:
	<b>Track One: Breaking Down the Brokerage Statement</b> <b>Speaker: Shannon Hall, EA</b>
	<b>Track Two: Countdown to 2026 - Advising Estate Planning Clients Today!</b> <b>Speaker: Frank Acuña, Attorney at Law</b>

	<b>Track Three: Disaster Casualty Losses: Tax Implications</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: Mastering the Tax Research Process: Analyzing Tax Authority</b> <b>Speaker: Tom Gorczynski, EA, USTCP</b>
	<b>Track Two: Intro to Representation</b> <b>Speaker: Josh Youngblood, EA</b>
	<b>Track Three: IRS Criminal Investigations for Non-Attorney Practitioners</b> <b>Speaker: LG Brooks, EA, CTRS</b>
12:00 PM to 1:20 PM	<i><b>Lunch and Learn: Tired of Going It Alone? Join the Movement Changing Tax Practice for Good</b></i> <i><b>Sponsored and presented by: InCite</b></i> <i><b>No CE offered for this course</b></i>
1:20 PM to 3:00 PM	Breakout Sessions:
	<b>Track One: Mastering the Tax Research Process: Practical Applications</b> <b>Speaker: Tom Gorczynski, EA, USTCP</b>
	<b>Track Two: 1031 Exchanges</b> <b>Speaker: Ryan Reichert, EA, CFP</b>
	<b>Track Three: Improving Data Security through Strategic Client Communications</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: Ryan Reichert, EA, CFP</b>
5:00 PM to 6:30 PM	Reception with Exhibitors

	<a href="#"><u>Tuesday, June 10, 2025</u></a>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	<b>Breakfast Keynote: 2025 California Tax Updates</b> <b>Speaker: Victoria Ramirez, FTB</b>
9:15 AM to 10:05 AM	Breakout Sessions:
	<b>Track One: The Power of the Research &amp; Development Credit: Case Studies</b> <b>Speaker: Brad Messner, EA</b>
	<b>Track Two: Community Property Law</b> <b>Speaker: LG Brooks, EA, CTRS</b>
	<b>Track Three: Reconciling Clean Vehicle Credits</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: The Gig Is Up: Handling Income in Unique Industries</b> <b>Speaker: Brad Messner, EA and Matt Metras, EA</b>
	<b>Track Two: Hit a Home Run With Your California Tax Update</b> <b>Speaker: Patty Barron, EA</b>
	<b>Track Three: Successful Audits for Individuals, Rentals &amp; Business</b> <b>Speaker: Jane Ryder, EA, CPA</b>
12:00 PM to 1:20 PM	<b>2025 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 Quest: The Ultimate Year-End Tax Planning Adventure</b> <b>Speaker: David Hilliard, EA, NTPI Fellow</b>

	<b>Track Two: California Property Tax Update</b> <b>Speaker: Frank Acuña, Attorney at Law</b>
	<b>Track Three: Intro to: FBAR, FATCA, and FinCEN</b> <b>Speaker: Claudia Stanley, CPA, 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>
6:00 PM to 7:00 PM	<b>Audit Lounge: AI After Dark</b> <i>Sponsored by: Financial Guardians</i> <b><i>No CE offered for this course</i></b>
	<a href="#"><u>Wednesday, June 11, 2025</u></a>
7:00 AM to 5:00 PM	Registration and Exhibits
8:20 AM to 10:05 AM	<b>Breakfast Keynote Session: Tax Stuff You Thought You Knew</b> <b>Speaker: Shannon Hall, EA and Ryan Reichert, EA, CFP</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: Retirement Tax Playbook: Navigating Key Tax Changes and Opportunities</b> <b>Speaker: David Hilliard, EA, NTPI Fellow</b>
	<b>Track Two: Digital Assets 101</b> <b>Speaker: Matt Metras, EA</b>
	<b>Track Three: Fundamentals of Business Tax Balance Sheets</b> <b>Speaker: Jane Ryder, EA, CPA</b>
12:00 PM to 1:20 PM	<b><i>Lunch and Learn: More information to come!</i></b>
1:20 PM to 3:00 PM	<b>General Session</b> <b>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: 10 Commandments for Your Practice: Ethics</b> <b>Speaker: Claudia Stanley, CPA, EA</b>
5:15 PM	Grand Prize Drawing

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

## New Member Resource - Classified Ads!

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!

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## Upcoming CSTC Chapter Events

### June 3, 2025

Federal and State Tax Controversy & Estate Planning  
San Diego - East County Chapter In-Person Meeting  
2 Federal Law hour(s) (Topics covering existing tax law)  
2 California hour(s) (Topics covering California law issues)  
[Click here](#) to learn more and register.

### June 4, 2025

Exploring a Variety of Charitable Contributions and Nonprofit Organizations  
San Gabriel Valley Chapter In-Person Meeting  
2 Federal Law hour(s) (Topics covering existing tax law)  
[Click here](#) to learn more and register.

Round Table Discussion  
Temecula Valley Chapter In-Person Meeting  
2 Federal Law hour(s) (Topics covering existing tax law)  
[Click here](#) to learn more and register.

Tax Planning for State PTET SALT Workaround  
San Francisco Bay Chapter Virtual Meeting  
2 Federal Law hour(s) (Topics covering existing tax law)  
[Click here](#) to learn more and register.

### June 17, 2025

Navigating Loss: Death of a Property Owner  
Sacramento Chapter In-Person Meeting  
2 Federal Law hour(s) (Topics covering existing tax law)  
[Click here](#) to learn more and register.

### June 18, 2025

Al Capone and The IRS: A Taxing Tale of How to (Not) File  
Inland Empire Chapter Virtual Meeting  
2 Federal Law hour(s) (Topics covering existing tax law)  
[Click here](#) to learn more and register.

### June 24, 2025

Two-Part Meeting: Buying & Selling Houses for Profit and Offer in Compromise  
Central Valley Chapter Virtual Meeting



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

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

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

**June 25, 2025**

When Does a Defined Benefit Plan Work Best?

San Jose Chapter Virtual Meeting

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

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

Exploring a Variety of Charitable and Nonprofit Organizations

Greater Long Beach Chapter In-Person Meeting

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

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

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

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## Welcome New CSTC Members!

**Connie Branson**

**San Gabriel Valley Chapter**

**Michael Diaz**

**Inland Empire Chapter**

**Ana Dioceselet**

**San Francisco Bay Chapter**

**Patricia Maison-Godfrey**

**San Diego-East County Chapter**

**Denis Mehulic**

**San Jose Chapter**

**Sheena Noel**

**San Jose Chapter**

**Steven Tyre**

**Greater Long Beach Chapter**

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# LEGISLATIVE ALERT

## 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.

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## NEWS FROM THE IRS

### [IRS releases fiscal year 2024 Data Book describing agency's activities](#)

IR-2025-63, May 29, 2025 — The Internal Revenue Service today issued its annual Data Book detailing the agency's activities during fiscal year 2024 (Oct. 1, 2023 – Sept. 30, 2024).

### [Tax pros: Register now for the 2025 IRS Nationwide Tax Forum](#)

IR-2025-62, May 27, 2025 — The IRS encourages tax professionals to register now for the 2025 IRS Nationwide Tax Forum, coming this summer to Chicago, New Orleans, Orlando, Baltimore and San Diego.

### [U.S. taxpayers living, working abroad must file 2024 tax return by June 16 deadline](#)

IR-2025-61, May 22, 2025 — The Internal Revenue Service encourages taxpayers living and working abroad file their 2024 federal income tax return and pay any tax due by Monday, June 16, 2025.

### [IRS announces call for grant applications for Tax Counseling for the Elderly and Volunteer Income Tax Assistance programs](#)

IR-2025-60, May 13, 2025 — The Internal Revenue Service is now accepting applications for the Tax Counseling for the Elderly (TCE) and Volunteer Income Tax Assistance (VITA) grants.

### [Interest rates remain the same for third quarter of 2025](#)

IR-2025-59, May 12, 2025 — The Internal Revenue Service announces that interest rates will remain the same for the calendar quarter beginning July 1, 2025.

### [IRS opens application period for Low Income Taxpayer Clinic grants May 15](#)

IR-2025-58, May 9, 2025 — The Internal Revenue Service will begin accepting applications for Low Income Taxpayer Clinic matching grants from all qualified organizations from May 15, 2025, to July 14, 2025. The period of performance for the grant will be Jan. 1, 2026, to Dec. 31, 2026.

### [IRS reminds taxpayers and small businesses to look out for scams](#)

IR-2025-57, May 8, 2025 — The Internal Revenue Service joins in celebrating National Small Business Week by reminding taxpayers and small businesses that, even though the April 15, 2025, tax filing deadline has passed, it is important to stay vigilant against scams and fraud year-round.

### [IRS celebrates entrepreneurs and small business owners during National Small Business Week](#)

IR-2025-56, May 2, 2025 — The Internal Revenue Service celebrates National Small Business Week, May 4-10, with important tools and insights for entrepreneurs and small business owners to protect their businesses and successfully navigate tax filing requirements.

### [News release and fact sheet archive](#)

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

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# 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
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**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.



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 Excelerate America.

THANK YOU TO OUR 2024 SYMPOSIUM SPONSORS



LEGACY  
INVESTMENTS  
& REAL ESTATE