



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

March 2025

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From the CSTC President

How's everyone doing?

Things are revving up in my office, and I am doing my best to stay on top of client work and also be mindful of my own well-being. My tap class is going great, and in case you were curious: yes, there IS a recital. It's been really fun to shake the cobwebs off, literally (those tap shoes have been tucked away in the closet for a while) and figuratively. Muscle memory is pretty amazing!

I hope that you are making some time to do something that brings you joy this tax season!

There has been a lot of buzz lately about the activities at the IRS and the impact it may have on this tax season and beyond. I'm not trying to get political here (if you want that you can buy me a drink the next time you see me), but I do think that there is a pretty good chance this will cause some additional stress for us this year. Processing may be delayed, which means that taxpayers will be calling us to see where their refunds are. Practitioner Priority wait times may be longer and it will likely be more difficult to assist our clients in resolving issues. Right now, our best weapon might be patience.

BOI is Back, baby! (Well, sort of)

I hesitate to even write this, considering the whiplash-inducing amount of back-and-forth there has been on this issue, but after several injunctions and stays, as of February 19, 2025 Beneficial Ownership Reporting is once again mandatory. For most companies, reports must be filed by March 21, 2025. You can find the most up-to-date information on the [FinCEN](#) website.

*UPDATE - Since writing this on the 26th, FinCEN released Notice FIN-2025-CTA2 indicating that despite the March 21st

deadline, they will not issue any fines or penalties or take any other enforcement action based on failure to file or update reports until they issue an interim final rule.

So, the question continues to be: “to B(OI) or not to B(OI)?”

Are you taking advantage of the CSTC Member Listserv?

We all sometimes find ourselves facing a new or challenging tax situation that we just don’t know how to tackle. The CSTC Member Listserv lets you send your question out to our network of members who offer their insight and support. This can be an invaluable benefit, especially this time of year.

If you prefer to ask your questions in person, many of our chapters are hosting their tax season roundtable meetings. Be sure to check out the calendar [here](#) to see what’s coming up in your area.

Did you see that registration is open for our Summer Symposium? The committee has hit it out of the park and put together a truly spectacular line-up this year! We have some Symposium rookies as well as some veterans, and I cannot wait to see you in Reno! The Symposium is my favorite event of the year because I get to see so many friends from across the state and sometimes the country, all while getting all of the CE I need for the year in one place. I guarantee this is the most fun you can have learning about taxes...

As the tax season ramps up, remember to lean on each other and be kind to yourselves.

Shannon Hall
President



REGISTRATION IS OPEN 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

	<u>Sunday, June 8, 2025</u>
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)
	<u>Monday, June 9, 2025</u>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	IRS Breakfast Keynote Session Speaker: TBA
9:15 AM to 10:05 AM	Breakout Sessions:

	Track One: Breaking Down the Brokerage Statement Speaker: Shannon Hall, EA
	Track Two: Countdown to 2026 - Advising Estate Planning Clients Today! Speaker: Frank Acuña, Attorney at Law
	Track Three: Disaster Casualty Losses: Tax Implications 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: Mastering the Tax Research Process: Analyzing Tax Authority Speaker: Tom Gorczynski, EA, USTCP
	Track Two: Intro to Representation Speaker: Josh Youngblood, EA
	Track Three: IRS Criminal Investigations for Non-Attorney Practitioners Speaker: LG Brooks, EA, CTRS
12:00 PM to 1:20 PM	<i>Lunch and Learn: More information to come!</i>
1:20 PM to 3:00 PM	Breakout Sessions:
	Track One: Mastering the Tax Research Process: Practical Applications Speaker: Tom Gorczynski, EA, USTCP
	Track Two: 1031 Exchanges Speaker: Ryan Reichert, EA, CFP
	Track Three: Improving Data Security through Strategic Client Communications Speaker: Brad Messner, 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 10, 2025</u>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	Franchise Tax Board Breakfast Keynote Session 2025 California Tax Updates Speaker: TBA
9:15 AM to 10:05 AM	Breakout Sessions:
	Track One: The Power of the Research & Development Credit: Case Studies Speaker: Brad Messner, EA
	Track Two: Community Property Law Speaker: LG Brooks, EA, CTRS
	Track Three: Corporate Transparency Act: Navigating Beneficial Ownership Reporting 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: The Gig Is Up: Handling Income in Unique Industries Speaker: Brad Messner, EA and Matt Metras, EA
	Track Two: Hit a Home Run With Your California Tax Update Speaker: Patty Barron, EA
	Track Three: Successful Audits for Individuals, Rentals & Business Speaker: Jane Ryder, EA, CPA

12:00 PM to 1:20 PM	2025 Annual Business Meeting and Awards Ceremony Luncheon (Included with registration)
1:20 PM to 3:00 PM	Breakout Sessions:
	Track One: Tax Quest: The Ultimate Year-End Tax Planning Adventure Speaker: David Hilliard, EA, NTPI Fellow
	Track Two: California Property Tax Update Speaker: Frank Acuña, Attorney at Law
	Track Three: Intro to: FBAR, FATCA, and FinCEN Speaker: Claudia Stanley, CPA, EA
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Business Tax Update Speaker: Ryan Reichert, EA, CFP
	<u>Wednesday, June 11, 2025</u>
7:00 AM to 5:00 PM	Registration and Exhibits
8:20 AM to 10:05 AM	Breakfast Keynote Session: Tax Stuff You Thought You Knew Speaker: Shannon Hall, EA and Ryan Reichert, EA, CFP
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: Retirement Tax Playbook: Navigating Key Tax Changes and Opportunities Speaker: David Hilliard, EA, NTPI Fellow
	Track Two: Digital Assets 101 Speaker: Matt Metras, EA
	Track Three: Fundamentals of Business Tax Balance Sheets Speaker: Jane Ryder, EA, CPA

12:00 PM to 1:20 PM	<i>Lunch and Learn: More information to come!</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: 10 Commandments for Your Practice: Ethics Speaker: Claudia Stanley, CPA, EA
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!

Support for Those Impacted by the Southern California Wildfires

Our hearts go out to all of the residents of Southern California who have been impacted by the fires in Los Angeles County. As a result of these fires, many of our members have found themselves displaced right at the start of tax season.

If you have been impacted and are in need of any support as we move into tax season, please contact the Society office at info@cstcsociety.org.

A number of members have reached out to offer equipment and assistance to any of our colleagues who have been affected by the fires. If you would like to donate any items, or if you have office space or time to assist with preparation, please contact the Society office.

If you would like to assist with facilitating the drop-off of items in your area, please let us know and we will coordinate.

It has been amazing to see the response to this tragedy from our members. Thank you for showing up for your friends and colleagues in such a tremendous and inspiring way.

SPECIAL THANK YOU!

The Central Valley Chapter would like to send out a huge thank you to all the individuals who donated office supplies and equipment to the fire victims. Without your support many of these individuals could not get back on their feet and continue to support their clients during this tax season.

Upcoming CSTC Chapter Events

March 4, 2025

Tax Breakfast Meeting

North County San Diego Chapter In-Person Meeting

1 Federal Law hour (Topics covering existing tax law)

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

March 5, 2025

Tax Elections for S-Corps, Shareholders, Partnerships, LLC's & Members

San Francisco Bay Chapter Virtual Meeting

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

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

March 9, 2025

Roundtable Discussion

Greater Long Beach Chapter In-Person Meeting

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

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

Roundtable Discussion

Central Valley Chapter In-Person Meeting

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

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

March 11, 2025

Tax Breakfast Meeting

North County San Diego Chapter In-Person Meeting

1 Federal Law hour (Topics covering existing tax law)

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

March 14, 2025

Round Table

Temecula Valley Chapter In-Person Meeting

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

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

March 16, 2025

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.

March 18, 2025

Tax Breakfast Meeting

North County San Diego Chapter In-Person Meeting

1 California hour (Topics covering California law issues)

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

March 25, 2025

Tax Breakfast Meeting

North County San Diego Chapter In-Person Meeting

1 Federal Law hour (Topics covering existing tax law)

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

March 28, 2025

Round Table

Temecula Valley Chapter In-Person Meeting

1 Federal Law hour (Topics covering existing tax law)

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

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

Welcome New CSTC Members!

Shawnta Brown

Greater Long Beach Chapter

Richard Foster

Central Valley Chapter

Anhngoc Le

San Jose Chapter

Roberta Robar

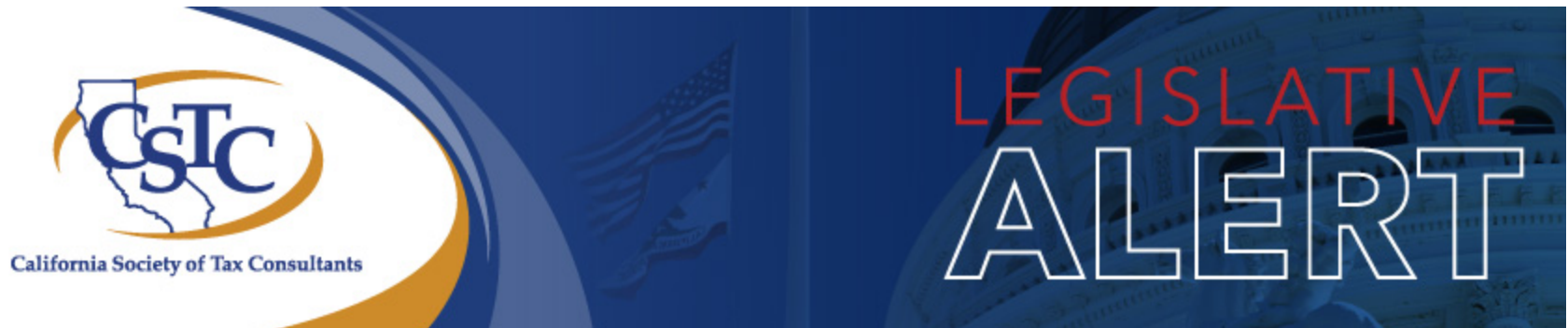
Central Valley Chapter

Elizabeth Salazar

Central Valley Chapter

Jennifer Shilling

Sacramento 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.



[Tax documents added to IRS Individual Online Account tool, enhancing services and convenience for taxpayers](#)

IR-2025-28, Feb. 27, 2025 — The Internal Revenue Service announced today it's making it easier for taxpayers to file their taxes by adding information return documents to their IRS Individual Online Account, helping consolidate important tax records into one digital location.

[IRS: Many farmers and fishers face March 3 tax deadline; disaster areas have more time](#)

IR-2025-27, Feb. 27, 2025 — The Internal Revenue Service today reminded farmers and fishers who chose to forgo making estimated tax payments by January that they must generally file their 2024 federal income tax return and pay all taxes due by March 3, 2025.

[Dirty Dozen tax scams for 2025: IRS warns taxpayers to watch out for dangerous threats](#)

IR-2025-26, Feb. 27, 2025 — The Internal Revenue Service today announced its annual Dirty Dozen list of tax scams for 2025 with a warning for taxpayers, businesses and tax professionals to watch out for common schemes that threaten their tax and financial information.

[Tax Time Guide: Use Where's My Refund? tool to track refund status](#)

IR-2025-25, Feb. 26, 2025 — As millions of people file their 2024 tax returns, the Internal Revenue Service today reminded taxpayers to use the Where's My Refund? tool on IRS.gov to confirm receipt of their return and track a refund.

[Krause to serve as acting IRS Commissioner; O'Donnell retires after distinguished career](#)

IR-2025-24, Feb. 25, 2025 — Secretary of the Treasury Scott Bessent announced today that IRS Chief Operating Officer Melanie Krause will become acting IRS Commissioner following the retirement announcement of Doug O'Donnell.

[Tax Time Guide 2025: Essentials needed for filing a 2024 tax return](#)

IR-2025-23, Feb. 19, 2025 — As the 2025 tax filing season continues, the Internal Revenue Service encourages taxpayers to make essential preparations and be aware of significant changes that may affect their 2024 tax returns.

[Don't wait on hold; use IRS online tools for faster help](#)

IR-2025-22, Feb. 12, 2025 — With the 2025 filing season underway and the anticipated high demand for IRS phone lines around the Presidents Day holiday, the Internal Revenue Service today encouraged taxpayers to visit IRS.gov and use online tools to get immediate answers.

[IRS urges taxpayers to choose tax preparers carefully to protect their personal information](#)

IR-2025-21, Feb. 3, 2025 — The Internal Revenue Service today reminded taxpayers that choosing the right tax professional is essential to helping them avoid tax-related identity theft and financial harm.

[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.



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



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 10% 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.

FOLLOW CSTC ON SOCIAL MEDIA!



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

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