



California Society
of Tax Consultants

CSTC Reporter e-Newsletter

CSTC Newsletter

March 2026

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From the CSTC President

Well, we're deep into tax season now. My season started off a bit slow, a statement that my office manager likes to remind me I make every year. As we wait for the last of our client's tax documents to arrive, the phones are disconcertingly quiet, and there always seems to be time to wonder if any the clients are going to come back this year.

And then, March hits. And I find myself longing for the quiet days of February.

The more the calls and emails come in the less actual work gets done, and the April deadline never wavers. If I reply to all the emails and phone calls, no tax returns get done. If I focus on returns, I get a lot done, but I have a bunch of clients grumpy that I didn't respond to them. I've struggled over the past few years to find the balance.

This year I have made some real efforts to protect my time and allow me to do the focused work that is necessary during this time of year. I have scheduled blocks of time where I close my email (not minimized, but CLOSED) and my Click-up and my Slack, throw my phone in a drawer, and I JUST do tax returns. So far it really does seem like just that little act of disconnecting keeps a fair amount of distractions at bay and frees my focus up to do the important tax work.

I am far from perfect in this new endeavor. I may have shared that I am a pretty egregious stress shopper, so the closer the deadline gets the more packages show up at my house. When I feel overwhelmed, the urge to hop online and buy something ridiculous is hard to ignore. If you are coming to the Summer Symposium this year (which you obviously should, are you registered yet?!?) I can show you some of my more outlandish purchases for this year (they are, of course, all ordinary and necessary). I have, on more occasions than I care to admit, logged into my browser to grab a quick MFA code and ended up buying a new gadget, ultimately forgetting what I had gone online to do in the first place.

This time of year it gets harder and harder to shut out the noise and the distractions, but it is important to remember that your time is a valuable resource, and it is one that is not fungible. Protect your time, it will do a lot to protect your sanity. Stay cool, and stay disconnected.

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

	Sunday, June 7, 2026
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:

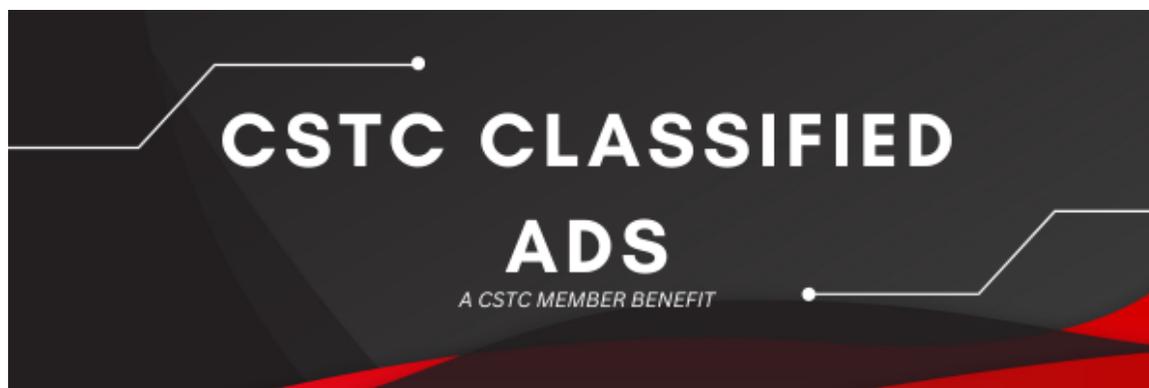
	Track One: Short-Term Rentals: Fact from Fiction Speaker: Natalie Kolodij, EA, CRETS
	Track Two: Practical Digital Asset Reporting - How to make the most of software Speaker: Matt Metras, EA
	Track Three: California Individual Tax Update Speaker: Patricia Barron, EA
3:00 PM to 3:20 PM	Break with Exhibitors
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!



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

March 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.

March 15, 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.

RoundTable Discussion on California and Federal Updates

Central Valley Chapter In-Person Meeting

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

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

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

March 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!

Marcell Beal

Temecula Valley Chapter

Tina Chang
Greater Long Beach Chapter

Genoveva C Nielson
Inland Empire Chapter

Andrew Ford
San Francisco Bay Chapter

Brett Lathrup
San Diego-North County Chapter

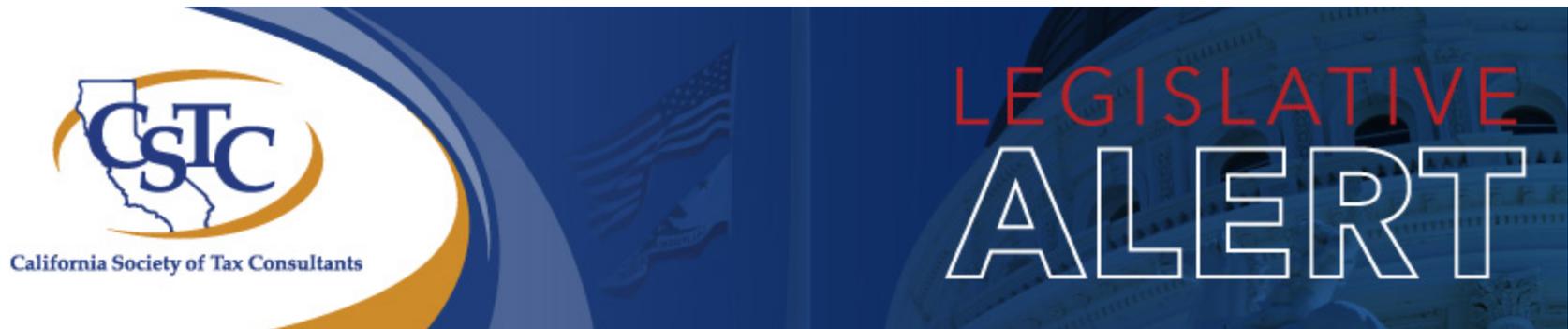
Melissa Maldonado
Los Angeles Chapter

Reynaldo Montero
Central Valley Chapter

Iryna Voronina Parsi
San Francisco Bay Chapter

Christian Root
Temecula Valley Chapter

Jeremy Wells
Member-at-Large 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.



[Treasury, IRS issue FAQs about general refundability and recognizing Indian tribal governments for purposes of making a special needs determination for the Adoption Tax Credit](#)

IR-2026-27, Feb. 27, 2026 – The Department of the Treasury and the Internal Revenue Service today issued frequently asked questions on FS-2026-03 related to general refundability and recognizing Indian tribal governments for purposes of making a special needs determination for the Adoption Tax Credit.

[IRS launches new web page to streamline tax fraud and scam reporting](#)

IR-2026-26, Feb. 26, 2026 – The Internal Revenue Service today announced the launch of a new web page that allows taxpayers to confidentially report suspected tax fraud, scams, evasion, or other tax-related illegal activities, as well as internal-facing improvements that will enhance how referrals are used to stop illegal activity.

[Treasury, IRS issue guidance on special depreciation allowance for qualified production property, announce upcoming proposed regulations under the One, Big, Beautiful Bill](#)

IR-2026-25, Feb. 20, 2026 – The Department of the Treasury and the Internal Revenue Service today provided interim guidance for taxpayers regarding the special depreciation allowance for qualified production property enacted under the One, Big, Beautiful Bill.

[Avoid waiting on hold; use IRS online tools for faster help](#)

IR-2026-24, Feb. 13, 2026 – With the 2026 filing season underway and increased call-center demand around the Presidents Day holiday on Feb. 16, the Internal Revenue Service encourages taxpayers to visit Let Us Help You on IRS.gov and use online tools to get fast, convenient help without waiting on hold.

[Treasury, IRS provide guidance for certain energy tax credits regarding material assistance provided by prohibited foreign entities under the One, Big, Beautiful Bill](#)

IR-2026-23, Feb. 12, 2026 – The Department of the Treasury and the Internal Revenue Service today issued a notice providing guidance for determining whether electricity-producing qualified facilities, energy storage technologies, or eligible components are receiving material assistance from a prohibited foreign entity (PFE) and would be ineligible for certain energy tax credits.

[IRS announces next expansion of Tax Pro Account to support tax professional businesses](#)

IR-2026-22, Feb. 9, 2026 – The Internal Revenue Service today announced a new expansion of Tax Pro Account, introducing business-level digital capabilities for tax professionals who work in tax-preparation companies, accounting firms, or other organizations.

[Create an IRS Individual Online Account today for security and convenience](#)

IR-2026-21, Feb. 3, 2026 – The IRS encourages all taxpayers to create an IRS Individual Online Account to access their tax account information securely online and to help protect against identity theft and fraud.

[Treasury, IRS issue proposed regulations on the clean fuel production credit under the One, Big, Beautiful Bill](#)

IR-2026-20, Feb. 3, 2026 – The Department of the Treasury and the Internal Revenue Service today issued proposed regulations for domestic producers of clean transportation fuel to determine their eligibility for and calculate the clean fuel production credit under the One, Big, Beautiful Bill.

[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.



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 Members Special Society 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 members, 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.

FOLLOW CSTC ON SOCIAL MEDIA!



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

