



California Society of Tax Consultants

Orange County - South Chapter – August 2019

Monthly Meetings are held on the Fourth Tuesday in January and in May through November

August 27, 2019 (registration @ 5:30pm)

Topic: Ethics

Due diligence requirements serve an important function in curbing problem preparers and decreasing the risk of improper refunds to ineligible taxpayers. However, although a powerful tool in dealing with unscrupulous preparers, how do ethical preparers navigate IRC SS 6695(g), the PATH Act, Circular 230 and increased due diligence requirements as well as steering clear of other potential problems.

Knowledge Level: Intermediate

Speaker: Kevan McLaughlin, JD, LL.,M Certified Tax Law Specialist, Attorney at Law

Kevan McLaughlin is a Certified Tax Law Specialist whose practice focuses on civil and criminal tax controversy and litigation matters. In addition to representing taxpayers before the IRS, FTB, CDTFA, and US Tax Court in civil and criminal matters, McLaughlin has a unique practice in defending accounting professionals before the California Board of Accountancy (CBA), the IRS and the IRS's Office of Professional Responsibility (OPR) who are accused of violating various statutes and regulations, including Circular 230 provisions. McLaughlin is also an adjunct professor at SDSU's Charles W. Lamden School of Accountancy where he teaches "Ethics for Accountants."

Ethics: 2 hours

IRS: 18QC1-T-01xxx-19-I

CTEC: 1000-CE-4xxx

DINNER RESERVATION

The Orange County – South Chapter meeting is **Tuesday, August 27, 2019, 5:30pm.**

Reservations are required by 11:00 am, Friday, August 23, 2019

You must register for this meeting online at: www.cstcsociety.org (no walk-ins).

On the society webpage, click on **Calendar**, then select the meeting date. An information webpage will open. The “**Register Now**” button is at the bottom of the page.

You may pay **online** using a credit or debit card (cards are **NOT** accepted at the meeting site). Payment by cash or check may be made at the door.

MEMBERS with reservations \$40; NON-MEMBERS \$60

You must make a reservation. If you make a reservation and are a no show, you will be billed for the dinner at the member cost. You must also make a reservation so that there are sufficient educational materials and outlines. Seating is limited!

ENTREE CHOICE:

New York Steak

Chicken Alfredo

Poached Salmon

Vegetarian

Changes to your entrée cannot be made after you register. Meal includes salad and dessert.

***** Drinks – Coffee, Tea, & Soda – “No Charge”

***** Alcoholic Beverages are “EXTRA”.

Meeting schedule:

Registration: 5:30pm

Dinner service: 5:45pm This is a plated dinner. Please be courteous and be on time!

Guest introductions: 6:30pm

Speaker 1st hour: 6:45pm

Break: 7:35pm

Speaker 2nd hour: 7:45pm

Meeting ends: 8:45pm

***** MEETING LOCATION:**

The Vintage Steakhouse

26701-B Verdugo St. San Juan Capistrano, CA 92675 Phone: (949) 661-3400

Free parking in the lot in front of the restaurant. There is reserved free restaurant parking to the right of the restaurant, in the adjacent parking lot. Parking is available in the parking structure at the end of the street, but payment may be required (sorry 😞).

Upcoming 2019 Meetings:

September 24: Lila Fedler, FTB: California Tax Updates

October 22: Monica Haven, E.A., J.D.: Tax Issues for US Citizens Abroad

November 19: TBA

ORANGE COUNTY - SOUTH CHAPTER OFFICERS & DIRECTORS:

President:	Guy Liford, EA	Email: asktaxguy@yahoo.com	949-683-6311
Vice President:	Michael Locke, EA	Email: mjlocke@sbcglobal.net	949-582-8381
Treasurer:	Donna Hunt, EA	Email: donna@dhtaxacct.com	949-586-6225
Secretary:	Lisa Cruz	Email: liscruz@yahoo.com	949-308-8448
Director:	Debbie Roberts, CPA	Email: rw@robertsandwise.com	949-215-7447

CSTC MISSION STATEMENT

To promote professionalism by providing quality educational events for tax professionals, by creating and encouraging networking opportunities for members and by advocating professional standards and positions within the tax industry.

Society Office

320 Pine Ave., Suite #1050

Long Beach, CA 90802

Phone: 949-715-4192 Fax 949-715-6931

Visit us at www.cstcsociety.org

