



California Society of Tax Consultants

Orange County - South Chapter – May 2019

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

May 28, 2019 @ 5:45pm (registration starts @ 5:30pm)

Topic: Marijuana Taxation in California

On January 1, 2018 California became the ninth state in the U.S. to legalize the recreational use of marijuana. With over 40 million people living in California, this state is home to the largest legal market for marijuana in the country. The purpose of this course is to provide practitioners with a basic understanding of the unique tax implications and reporting requirements of deal “cannabis based” businesses. In this course, you will learn:

- The challenges in dealing with a cash intensive businesses
- What is IRC 280E?
- Form 8300 reporting requirements
- Learn about the sales, excise, and cultivation taxes applicable in California

Knowledge Level: Basic

Speaker: William E. Rogers, MBA, CFP, EA

William E. Rogers is the founder of ASCEND Business Advisory, a tax and business advisory firm in Rancho Santa Fe, CA. He is passionate in helping businesses eliminate the hassles of running their business so that they can “ASCEND to greater heights”. He earned a Bachelor’s degree in Business Management from the University of Redlands, an MBA from the University of Southern California, and an MS in Finance from Golden Gate University. He is also a Certified Financial Planner and an Enrolled Agent before the Internal Revenue Service. He has served as the Past President of the North County Chapter of the California Society of Tax Consultants, Past President of the Palomar Chapter of the California Society of Enrolled Agents, and served as a Director for the California Society of Enrolled Agents.

Federal Tax Law: 1 hour

California Tax Law: 1 hour

IRS 18QC1-U-0xxxx-19-I

CTEC: 1000-CE-xxxx

DINNER RESERVATION

The South Orange Chapter meeting is Tuesday, May 28, 2019.

PLEASE EMAIL (preferred) Lisa Cruz (liscacruz@yahoo.com) or call 949-308-8448 by the deadline so that a meal will be available for you. Please be sure to tell us your meal choice! If you have any special dietary needs such as a vegetarian plate please advise when you make your reservation. 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.

Reservations are expected by 5:00 PM, Thursday, January 17, 2019

MEMBERS with reservations \$40; with late or no reservations, \$50

NON-MEMBERS \$60

Payment by cash or check payable to CSTC can be made at the door. (Returned Check Charge is \$30).

Dinner service starts at 5:45pm!!

ENTREE CHOICE:

New York Steak
Champagne Chicken
Poached Salmon

Meal includes salad and dessert.

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

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

Time: Sign-in/Registration: 5:30pm

EMAIL the following registration info to Lisa Cruz (liscacruz@yahoo.com):

Entrée choice, name, phone, email, PTIN, professional designation & license number.

***** MEETING LOCATION:**

The Vintage Steakhouse
26701-B Verdugo St. San Juan Capistrano, CA 92675 Phone: (949) 661-3400
Free parking in structure at the end of the street (best), and in the lot across the street.

Upcoming 2019 Meetings:

June 25: Anthony Bustos, EA – Topic TBA

July 23: TBA

August 27: 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
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Director:	Deborah 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.

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Visit us at www.cstcsociety.org

