



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

November 2025

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From the CSTC President

First off, I want to thank everyone who reached out to me about the passing of my godfather, long-time CSTC member Steve Bruce. I received so many texts and emails from members expressing condolences and kind words and reading those messages brought me so much comfort in a very rough time.

And that's what this is all really about. We come together for all kinds of reasons: we want to network, we're looking for a place to get continuing ed hours, we want a tax-deductible dinner every month. Whatever the reason, what we end up with is a community.

And we're going to need each other in the coming months. This upcoming tax season is shaping up to be...exciting. Between the new OB3 provisions impacting 2025 returns AND California's new conformity bill (spoiler alert: we conform...to TCJA) we have some of the most sweeping tax law changes in years. And with changes come questions:

Will the filing season start on time?

How many pages will the Schedule CA be this year?

Can I take the tips deduction if I sell pictures of my feet online?!?

We're going to have our work cut out for us.

But you know what? We don't have to do it alone! There's likely a chapter near you that already has roundtable meetings on the schedule for next year. These are great opportunities to come together with colleagues and work through those tough tax questions together. There are meetings in-person and online, so whatever your preference there's a meeting for you!

Speaking of CE, this is your friendly reminder that if you are an Enrolled Agent and your SSN ends with 4, 5, or 6 it's time to renew your EA! I've heard rumblings that the shut-down might impact processing of EA applications (new and renewal) so I would recommend not waiting to the last minute to get those in.

It's also PTIN renewal time, so make sure to log-in and get ready for 2026.

As we move into November many of us start thinking about gratitude and what that means. I am grateful for each and every one of you reading this message. I am grateful for the friendships I have formed and the amazing opportunities that I have found through this organization. We are all the heart and soul of CSTC and I am honored to be a part of it.

Stay cool, friends.

Shannon Hall
President



SAVE THE DATE FOR THE 2026 SUMMER SYMPOSIUM!
Registration Opening SOON!

JUNE 7 - 10, 2026
SILVER LEGACY RESORT CASINO
RENO, NEVADA

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

Help Wanted

Experienced Tax Professional wanted. Flexible sched, f/t or p/t. Competitive comp+benefits+bonuses! Centrally located in San Diego, professional yet comfortable office. Hoping for a long-term employee who can grow with our business. Equity interest may be available for employee who wants to take on greater role. Please contact Robert Freidson at Robert@sandiegotaxprofessionals.com for more information.

Office Space Available

CPA near John Wayne Airport has private office with services for rent. Per Diem assignments are available. Prefer CPA seeking to grow existing practice. Near term transition also considered. Contact Philip Becker at celiaso@aol.com for more information.

Looking to Buy Practice

Looking to purchase a tax practice in San Diego County with up to 100 clients, specializing in individual returns. I offer personalized service, a commitment to high-quality care, and am ready to assist with a smooth transition for retirement. Contact me if you're ready to sell at Susan@taxwisepros.com or 9257861490

Help Wanted

BOOKKEEPER/RECEPTIONIST - Established El Cajon Tax and Bookkeeping Service seeking a, detail-oriented, and reliable bookkeeper. 25-30 hrs per wk with 40 hrs per wk during tax season. Must have phone skills and knowledge of Quickbooks, Excel, Word, P/R and sales tax. Will train on tax software. Contact Daniel Carr at 619-442-9602 or dcarr23886@aol.com for more information.

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!



Registration for the 2025 Virtual Fall Forum is OPEN! Nonprofits – Trusts From A-Z Webinars

Fall Forum is back and we're doing Trusts From A-Z. This series will discuss what to do when a client dies, the types of returns that need to be filed, forms to be completed, when to file a trust return, the different schedules for rentals,

depreciation and the K1 for the personal tax return. This will be a 4-part series with 12 Fed hours and below are the
Dates/Times of each webinar. Register today!

IMPORTANT: Every class will be recorded and the materials will be available before and after class. If you miss a class, you will still receive the recording and materials, but you will not receive credit.

November 6, 2025 Webinar

Your Client Just Died Now What?

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

November 12, 2025 Webinar

A Trust Exits, Now What?

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

November 17, 2025 Webinar

Form 1041- Trusts & Estates Fundamentals

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

November 20, 2025 Webinar

TRUSTS: Form 1041 Tax Preparation: Line by Line

3 Federal Tax Update hour(s) (Topics covering existing tax law)

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

Upcoming CSTC Chapter Events

November 4, 2025

2025 Federal Update

San Diego - East County Chapter In-Person Meeting

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

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

November 5, 2025

Work Opportunity Tax Credit (WOTC)

San Gabriel Valley Chapter In-Person Meeting

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

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

Discover QLAC's Secure retirement income, minimize risks and maximize benefits

Temecula Valley Chapter In-Person Meeting

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

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

Reasonable Compensation – S Corp/Corporations

San Francisco Bay Chapter Meeting

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

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

November 11, 2025

Two-Part Meeting: Choice of Entity and Working with Senior Taxpayers

Central Valley Chapter Virtual Meeting

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

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

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

November 12, 2025

Dissolution: Closing a Business Entity from a Federal Perspective

Orange County Chapter In-Person Meeting

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

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

November 13, 2025

2025 OBBBA Tax Update: Individual and Business

San Diego Chapter Virtual Meeting

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

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

Discover QLACs: Secure retirement income, minimize risks, maximize benefits!

North County San Diego Chapter In-Person Meeting

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

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

Social Mixer

San Diego - East County Chapter In-Person Event

No CE hours provided for this event.

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

November 19, 2025

2025 OBBB Tax Update: Individuals & Business

Inland Empire Chapter In-Person Meeting

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

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

Exploring the One Big Beautiful Bill Act
Greater Long Beach Chapter In-Person Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

November 21, 2025

1031 Exchanges - Just 6 Simple Numbers
San Diego Chapter In-Person Seminar
4 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

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

Welcome New CSTC Members!

Thelonius Alexander
Los Angeles

Cathy Barnhart
Inland Empire

Philip Becker
Orange County- South

Rina Szwarc-Coleman
San Diego

Logan Crow
Temecula Valley

Alfred Gonzalez
Inland Empire

Caprice Krough
Central Valley

Alan Mattei
San Diego-East County

Maria Mercado
Central Valley

Miguel Quimbayo
Los Angeles

Rosa Rodriguez
San Diego

Vanessa Rosenberg
Orange County

Jasmine Ruiz
Orange County

Steven Shadley
San Diego



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.



[IRS reminds tax pros to renew PTINs for the 2026 tax season](#)

IR-2025-108, Oct. 27, 2025 — The Internal Revenue Service today reminds the more than 800,000 paid tax preparers that preparer tax identification numbers must be renewed annually, and the 2026 renewal period is now open.

[IRS issues FAQs on Form 1099-K threshold under the One, Big, Beautiful Bill; dollar limit reverts to \\$20,000](#)

IR-2025-107, Oct. 23, 2025 — The Internal Revenue Service today issued frequently asked questions in Fact Sheet 2025-08 regarding the dollar threshold for filing Form 1099-K under the One, Big, Beautiful Bill.

[IRS issues FAQs to address Employee Retention Credits under ERC compliance provisions of the One, Big, Beautiful Bill](#)

IR-2025-106, Oct. 22, 2025 — The Internal Revenue Service today issued frequently asked questions in Fact Sheet 2025-07 relating to the limitation on credits and refunds for Employee Retention Credits claimed for the third and fourth quarters of 2021 that were filed after Jan. 31, 2024. This limitation was enacted under the One, Big, Beautiful Bill.

[Treasury, IRS provide transition relief for 2025 for businesses reporting car loan interest under the One, Big, Beautiful Bill](#)

IR-2025-105, Oct. 21, 2025 — The Department of the Treasury and the Internal Revenue Service today provided transitional guidance for businesses required to report car loan interest under the One, Big, Beautiful Bill. Notice 2025-57 provides penalty relief and guidance to certain lenders for new information reporting requirements for car loan interest received in 2025 under the OB BB.

[IRS reminds taxpayers who filed for extensions of the Oct. 15 deadline](#)

IR-2025-104, Oct. 14, 2025 — The Internal Revenue Service today reminds individuals who filed extensions for tax year 2024 that their tax returns are due tomorrow. Further, the agency reminds taxpayers that the current lapse in appropriations does not affect the tax filing and payment responsibilities of taxpayers.

[IRS releases tax inflation adjustments for tax year 2026, including amendments from the One, Big, Beautiful Bill](#)

IR-2025-103, Oct. 9, 2025 — The Internal Revenue Service today announced the tax year 2026 annual inflation adjustments for more than 60 tax provisions, including the tax rate schedules and other tax changes. Revenue Procedure 2025-32 provides details about these annual adjustments.

[Treasury, IRS provide penalty relief for remittance transfer providers who fail to deposit excise tax under the One, Big, Beautiful Bill](#)

IR-2025-102, Oct. 7, 2025 — The Department of the Treasury and the Internal Revenue Service today issued guidance providing deposit penalty relief for the first three quarters of 2026 to remittance transfer providers. Notice 2025-55 provides relief in connection with the new excise tax imposed on certain remittance transfers under the One, Big, Beautiful Bill.

[IRS announces leadership change, Jarod Koopman to lead agency's enforcement efforts](#)

IR-2025-101, Oct. 6, 2025 — The Internal Revenue Service today named Jarod Koopman as its Acting Chief Tax Compliance Officer, overseeing IRS employees in its enforcement divisions.

[IRS Independent Office of Appeals starts Post Appeals Mediation pilot program](#)

IR-2025-100, Oct. 1, 2025 — The IRS Independent Office of Appeals is launching a two-year pilot program to make Post Appeals Mediation more attractive to taxpayers.

[IRS extends the period for feedback on Form 6765](#)

IR-2025-99, Oct. 1, 2025 — The Internal Revenue Service announced today that it is continuing to seek feedback regarding the draft Instructions for Form 6765 and is extending the dates for certain reporting requirements related to the Credit for Increasing Research Activities, also known as the research credit.

[Volunteers needed to provide no-cost tax services for the upcoming filing season](#)

IR-2025-98, Oct. 1, 2025 — The IRS and its community partners are seeking volunteers to support the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs.

[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
-

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.

****NEW MEMBER BENEFIT****



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 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 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 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

