



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

October 2025

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From the CSTC President

Well, the finish line is in sight, though I'm still not sure how it came to be October so quickly. As I turn the page from September to October, I start gathering my Halloween accessories and planning out the second installment of my "31 Days of Spooky": 31 days, 31 spooky outfits with no repeats. Oh yeah, and I do some tax returns, too.

This has been one of the most exciting years for tax law changes since I joined what my godfather calls "the family business." Sure, I was around for the great California Conformity of 2015, and navigated the implementation of the Affordable Care Act and the Tax Cuts and Jobs Act, but to have a sweeping tax bill like the One Big Beautiful Bill (OB3) Act AND a new Specified Date for California conformity all in one year?!?

As I write this, SB 711 sits on the Governor's desk, waiting to give California taxpayers conformity to federal law as of January 1, 2025. Sounds great, right? But there was a little thing that happened on July 4th of 2025. That's right, California conforms...to the TCJA, but not OB3.

This means that we're going to have our work cut out for us, and it means that update seminars are going to be more fun than usual this year.

Once the final deadline passes and we look back on the beast that was Tax Season 2025, I will be looking forward to spending the crisp fall days catching up with friends, catching up on reading, exploring all the Halloween Haunts that I can squeeze in before October 31st, and enjoying some much needed respite.

A quick reminder to all my CTECs out there: that October renewal deadline is creeping up. If you find yourself short on hours, be sure to check out the CSTC calendar. We have chapters offering Ethics, fed tax law and fed update, and CA hours all throughout October, guaranteeing that you can get those last few requirements in just under the wire.

We're so close now! Remember to take time for the things that make you happy and keep you sane, be that a ridiculous reality show that lets you check out for a while (Love is Blind is back today!), a pass through a monster-filled maze, a history documentary, or a glass of wine with people you love.

Stay cool, my friends!

Shannon Hall
President



DEADLINE APPROACHING!

Call for 2026 Summer Symposium Presenters

The California Society of Tax Consultants (CSTC) provides quality tax education for tax professionals, including CTEC-registered preparers, Enrolled Agents, CPAs and attorneys. CSTC's premier education event is the Summer Tax Symposium.

The 2026 Symposium will be a live event held June 7-10, 2026, at the Silver Legacy Resort Casino in Reno, Nevada. CSTC is looking for speakers to share their tax knowledge and expertise with their peers and colleagues. Seminar sessions range from one to four-hour classes that provide attendees with information about the topic as well as practical applications they can put to use in their practices.

We are accepting submissions in all areas of taxation including:

- Current tax updates
- Individual tax
- Businesses
- Exempt Organizations

- Trusts and Estates
- California Tax
- Representation
- Tax Planning
- Other topics related to taxation

While this is a live event, there will be a webinar series to be held throughout the year, so please feel free to submit even if you prefer not to attend a live event and your submission will be considered for virtual events.

Please [CLICK HERE](#) to fill out the Call for Presenters Form in its entirety and submit it no later than **October 3, 2025 at 5 pm**. Only complete submissions will be considered.

Presenters are selected by the Education Committee based on recommendations and fit with the overall goal of the Symposium. **All submitters will be notified by October 30, 2025.**

If you have any questions, please contact the CSTC office by phone at 949-715-4192 or by email at info@cstcsociety.org.

CSTC Summer Symposium Committee
www.cstcsociety.org

SAVE THE DATE FOR THE 2026 SUMMER SYMPOSIUM!

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!

Scholarships for the 2026 Summer Symposium will be available to CSTC members. More information coming soon!



New CSTC Member Benefit!

The connection between the California Society of Tax Consultants and Brass Tax goes back decades (back then it was known as ISTC).

Countless members have achieved their Enrolled Agent designation with the help of the Brass Tax EA Bootcamp, and many

more attend the annual Tax Toolbox and Update seminars.

Dave Gorsich and Mike Karll were active at both the chapter and state level of the Society, as was their successor, Lisa Ihm. When Ryan Reichert took the helm from Lisa a few years ago, he met Shannon Hall at a CSTC dinner meeting and brought her on board.

With so much history, it's really a wonder that it took this long to welcome Brass Tax as an official CSTC member benefit.

What does this mean?

It means that 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.

CSTC members, login to the [CSTC Member Center](#) to access the discount code to receive \$30!



CSTC Classified Ads - A Member Benefit



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

Practice for Sale

Self-employment opportunity for San Diego area resident to work in La Mesa office. Partial transfer of long-established practice to serious tax professional. Minimum 5 years heavy intermediately complex experience. Use Pro-Series. Buyer's resume to Patricia Maison-Godfrey at patricia@taxladyonline.com or call 619.697.2852.

Help Wanted

Full-Charge Bookkeeper needed (onsite in San Diego). Min. 5 yrs exp in accounting office required. Must know QB Desktop & Online (QBOA), MS Office. Duties: Bookkeeping, tax forms, organized, strong communication skills. Not remote/training. Email resume to Lisa Lindgren at lisa@lindgrenfs.com if qualified.

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

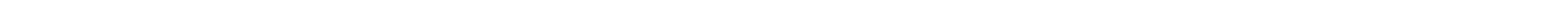
Submissions will be reviewed by editors for approval by the 15th of the month. If approved, the ad will be included in the Reporter for the remainder of the quarter. Submissions received after the 15th of the month will be reviewed the following month.

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!





Upcoming CSTC Wednesday Webinar

Wednesday, October 1, 2025

Social Security Fairness Act and IRMAA Planning

10:00 AM to 12:00 PM PST

Cost: Member: \$40 / Non-Member: \$70

Presenter(s): Lawrence Pon, CPA/PFS, CEP, EA, USTCP, AEP

[CLICK HERE](#) TO LEARN MORE AND REGISTER!

Upcoming CSTC Chapter Events

October 1, 2025

Nuts and Bolts about Non Profits

San Gabriel Valley Chapter In-Person Meeting

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

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

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

California Tax Updates

Temecula Valley Chapter In-Person Meeting

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

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

October 7, 2025

10 Commandments for Your Practice: Ethics

Orange County Chapter Virtual Meeting

2 Ethics hour(s) (Topics meeting the ethics requirements under Cir 230)

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

We Care to Share: Human Relations in Business and Dinner Meeting: The Tax and Estate Implications of One Big Beautiful Bill:

What You Need to Know and Basic International Tax Compliance for Individuals

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.

October 8, 2025

PassiveNormal Activity

Orange County Chapter In-Person Meeting

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

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

October 9, 2025

The Tax and Estate Implications of One Big Beautiful Bill and the Ins and Outs of EDD Audits

North County San Diego Chapter In-Person Meeting

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

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

October 16, 2025

California Adjustments (with Updates)

San Diego Chapter Virtual Meeting

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

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

October 21, 2025

One Big Beautiful Act (OB3 Act)

Sacramento Chapter In-Person Meeting

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

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

October 22, 2025

California Tax Update

Wine Country Chapter In-Person Meeting

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

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

On the Road Again, a review of Schedule C as it applies to long-distance truck drivers!

Greater Long Beach Chapter In-Person Meeting

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

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

Understanding Balance Sheets & Form 1120S Schedules L, M-1, M-2- A Guide for Non-Accountants

Inland Empire Chapter Virtual Meeting

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

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

Business Tax Boot Camp – S Corporation
Orange County - South Chapter Virtual Meeting
1 Federal Law hour(s) (Topics covering existing tax law)
1 California hour(s) (Topics covering California law issues)
[Click here](#) to learn more and register.

October 24, 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.

October 28, 2025

Two-Part Meeting: Hobbies or Business and Schedule A & 2106 CA Style
Central Valley Chapter In-Person Meeting
Part One: 4 Federal Law hour(s) (Topics covering existing tax law)
Part Two: 1 Federal Law hour(s) (Topics covering existing tax law), 1 California hour(s) (Topics covering California law issues)
[Click here](#) to learn more and register.

October 29, 2025

California Tax Update and Cal Savers
San Jose Chapter Virtual Meeting
2 California hour(s) (Topics covering California law issues)
[Click here](#) to learn more and register.

Business Tax Boot Camp S - Corporation Part Two
Orange County - South Chapter Virtual Meeting
2 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!

Debra Basinger
Central Valley Chapter

Solmaz Batkubaei
Los Angeles Chapter

Daniel Caughey
San Francisco Bay Chapter

Emily Cheney
San Francisco Bay Chapter

Fermin Colindrew
Los Angeles Chapter

Art Hovanissian
Los Angeles Chapter

Yvonne Lane
Greater Long Beach Chapter

John Le
Orange County Chapter

Romulo Luber
Sacramento Chapter

Brad Messner
Member-at-Large

Ada Padilla
San Jose Chapter

Tim Ryder
Greater Long Beach Chapter

Mariday Taruc
Orange County Chapter

Belar Watts
San Diego-North County Chapter



**LEGISLATIVE
ALERT**

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 provide guidance for Opportunity Zone investments in rural areas under the One, Big, Beautiful Bill](#)

IR-2025-96, Sept. 30, 2025 — The Department of the Treasury and the Internal Revenue Service today issued guidance on Qualified Opportunity Zone investments in rural areas as provided for under the One, Big, Beautiful Bill.

[Treasury, IRS issue regulations to reduce the amount of the user fee for tax professionals who apply for or renew a PTIN](#)

IR-2025-95, Sept. 29, 2025 — The Department of the Treasury and the Internal Revenue Service today issued interim final regulations and a notice of proposed rulemaking to reduce the amount of the user fee imposed on tax professionals who apply for or renew a preparer tax identification number (PTIN).

[IRS to phase out paper tax refund checks starting with individual taxpayers](#)

IR-2025-94, Sept. 23, 2025 — The Internal Revenue Service, working with the U.S. Department of the Treasury, today announced that paper tax refund checks for individual taxpayers will be phased out beginning on Sept. 30, 2025, as required by Executive Order 14247, to the extent permitted by law.

[IRS extends relief to farmers and ranchers affected by drought in 49 states, other regions](#)

IR-2025-93, Sept. 22, 2025 — The Internal Revenue Service today issued guidance that provides tax relief for farmers and ranchers in applicable states and regions who sold or exchanged livestock because of drought conditions.

[Treasury, IRS issue guidance listing occupations where workers customarily and regularly receive tips under the One, Big, Beautiful Bill](#)

IR-2025-92, Sept. 19, 2025 — The Department of the Treasury and the Internal Revenue Service today provided guidance on “no tax on tips” provision. The One, Big, Beautiful Bill proposed regulations identify occupations customarily and regularly receive tips and define “qualified tips” eligible taxpayers may claim as a deduction.

[Treasury, IRS issue final regulations on new Roth catch-up rule, other SECURE 2.0 Act provisions](#)

IR-2025-91, Sept. 15, 2025 — The Department of the Treasury and the Internal Revenue Service today issued final regulations addressing several SECURE 2.0 Act provisions relating to catch-up contributions.

[IRS assesses \\$162 million in penalties over false tax credit claims tied to social media](#)

IR-2025-90, Sept. 8, 2025 — The Internal Revenue Service is alerting taxpayers about a growing number of fraudulent tax schemes circulating on social media that promote the misuse of credits such as the Fuel Tax Credit and the Sick and Family Leave Credit.

[IRS urges emergency preparedness ahead of peak disaster](#)

IR-2025-89, Sept. 4, 2025 — As hurricane season peaks and wildfire risks remain high, the IRS urges individuals and businesses to create or update their emergency preparedness plans as part of National Preparedness Month.

[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****



CSTC members receive \$30 off every live seminar and 8-hour on-demand webinar that Brass Tax offers ever year! That means Tax Tool 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



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 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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BRONZE SPONSOR



BADGE SPONSOR



LUNCH & LEARN



AUDIT LOUNGE: AI AFTER DARK



EXHIBITOR RECEPTION (SPECIALTY DRINK)



CONFERENCE TOTE BAG INSERT



EXHIBITORS

