



PRESENTED BY SAN FRANCISCO BAY CHAPTER

2025 Tax Return Updates and Changes

WHAT YOU NEED TO KNOW FOR TAX SEASON 2026

1

Individual Update

- One Big Beautiful Bill Act, "OBBA" Individual Provisions, Especially 2025 Changes Made by OBBA
- Tax Planning Ideas for Clients
- Getting Ready for Tax Season

2

Business Update

- One Big Beautiful Bill Act, "OBBA" Business Provisions
- 2025 Changes Made by OBBA and Retroactive Changes
- Business Entity Considerations

3

California Update

- CA Conformity Update
- Tax Credits Update
- Business Entities Update

4

Due Diligence and Form 8867

- Learn about Due Diligence requirements under Circular 230
- How to avoid the \$632 per Due Diligence Failure Preparer Penalty
- Review Form 8867 - Paid Preparer's Due Diligence Checklist

Meet Your Instructor:



LARRY PON

CPA, PFS/CFPR, EA, USTCO, AEP

SATURDAY, DECEMBER 06, 2025

Double Tree Hotel 835 Airport Blvd., Burlingame, CA 94010

LIVE SEMINAR 8:30AM TO 4:30 PM

Live Seminar Includes: Spiral Handouts | Continental Breakfast and Lunch | Refreshments | Free Parking

REGISTRATION OPENS AT 7:30AM

REGISTER NOW! MEMBER: \$239.00 NON-MEMBER: \$289.00

*Sign up as a Member of CSTC SF Bay Chapter and get \$50 off non-member registration! Pay only \$239.00