



California Society
of Tax Consultants

CSTC Reporter e-Newsletter

CSTC Newsletter

May 2025

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From the CSTC President

First off, congratulations on making it through another tax season! Whether you have 1 extension or 100 (or *cough* more than that), you deserve to take a breath and celebrate the hard work that was done over the past few months.

We all know the work doesn't end on April 15th. Once the frantic e-filing ends, it's time to get down to the business of getting all of our continuing education hours. Which reminds me: have you signed up for our Summer Symposium yet? If not, what are you waiting for? We have an absolutely unbeatable line-up of speakers this year. If you think CE is boring, think again. You can check out the full schedule and register [here](#).

This is also a great time to start reviewing your systems to make sure that your data security is up to snuff. As if tax season wasn't enough fun on its own, my mail carrier surprised me with NOT ONLY a jury summons (which I very responsibly postponed until the summer) but also a letter from the city in which I live letting me know that in 2023 they had a data breach and my information was compromised. Don't be jealous.

Data security is a vital component of our business, and it is one that is, unfortunately, often overlooked, which is why we are so excited to announce that we have a new member benefit focused on data security for tax and financial professionals!

To say that the team at Financial Guardians is passionate about security would be an understatement. I've had many conversations with their founder Brad (who, by the way, is one of our Symposium speakers this year, so be sure to say hi to him in Reno) and the thing that always strikes me is how much he truly cares about improving our industry, not only by providing resources like WISP templates (if you don't know what that is you DEFINITELY need this) and support calls to talk about all things security and tech, but also through education. Your membership with Financial Guardians includes CE eligible trainings for you and your staff to make sure you have the best and most up-to-date information.

We will be providing all the details in the official roll-out, but in the meantime I encourage you to check them out at [Financial Guardians - because you can't amend identity theft](#)

On a final note, your local chapters are most likely looking to fill their leadership positions right about now. If you've ever wanted to be in on all the fun we have serving in chapter leadership, now is your chance! I joined the board of my local chapter the first year I was a member, and I have never looked back.

I am looking forward to getting together with my friends at our monthly dinner meetings, and I can't wait to share all of the surprises we have in store for Symposium.

See you in Reno!

Shannon Hall
President



REGISTRATION IS OPEN FOR THE 2025 SUMMER SYMPOSIUM!

JUNE 8 - 11, 2025

SILVER LEGACY RESORT CASINO

RENO, NEVADA

The California Society of Tax Consultants, Inc. (CSTC) has been a nonprofit organization dedicated to supporting tax professionals across California since 1966 (formerly known as ISTC). CSTC is committed to providing high-quality education and exclusive member benefits. Whether you're a bookkeeper, accountant, CRTP, Enrolled Agent, or CPA, CSTC has something valuable to offer.

Our programs cover a wide range of tax topics, all approved for CTEC, EA, and CPA credit. Did you know you can earn *all* your CTEC credits for the year at the Symposium? That's right—federal, update, ethics, and California hours, all in one event!

And guess what? The popular Lunch and Learn sessions are back! Your registration includes both breakfast and lunch each day of the event.

With an outstanding lineup of speakers and topics, there’s something for everyone, whether you’re a beginner or a seasoned tax preparer.

We can’t wait to see you in Reno! The CSTC Summer Tax Symposium is an event you won’t want to miss!

CLICK HERE TO LEARN MORE AND REGISTER!

Summer-Symposium Schedule-at-a-Glance

	<u>Sunday, June 8, 2025</u>
3:00 PM to 5:00 PM	Registration Open; Exhibitor Set-up
5:00 PM to 6:00 PM	Welcome Reception for First-Time Attendees
6:00 PM to 7:00 PM	Welcome Reception (light appetizers will be served) This event is family-friendly. (Included with full registration. Guest registration is \$95)
	<u>Monday, June 9, 2025</u>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	IRS Breakfast Keynote Session Speaker: TBA
9:15 AM to 10:05 AM	Breakout Sessions:
	Track One: Breaking Down the Brokerage Statement Speaker: Shannon Hall, EA
	Track Two: Countdown to 2026 - Advising Estate Planning Clients Today! Speaker: Frank Acuña, Attorney at Law

	Track Three: Disaster Casualty Losses: Tax Implications Speaker: Jane Ryder, EA, CPA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: Mastering the Tax Research Process: Analyzing Tax Authority Speaker: Tom Gorczynski, EA, USTCP
	Track Two: Intro to Representation Speaker: Josh Youngblood, EA
	Track Three: IRS Criminal Investigations for Non-Attorney Practitioners Speaker: LG Brooks, EA, CTRS
12:00 PM to 1:20 PM	<i>Lunch and Learn: More information to come!</i>
1:20 PM to 3:00 PM	Breakout Sessions:
	Track One: Mastering the Tax Research Process: Practical Applications Speaker: Tom Gorczynski, EA, USTCP
	Track Two: 1031 Exchanges Speaker: Ryan Reichert, EA, CFP
	Track Three: Improving Data Security through Strategic Client Communications Speaker: Brad Messner, EA
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Business Tax Update Speaker: Ryan Reichert, EA, CFP <i>(Previously Tuesday at 3:20 PM)</i>
5:00 PM to 6:30 PM	Reception with Exhibitors

	<u>Tuesday, June 10, 2025</u>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	Franchise Tax Board Breakfast Keynote Session 2025 California Tax Updates Speaker: TBA
9:15 AM to 10:05 AM	Breakout Sessions:
	Track One: The Power of the Research & Development Credit: Case Studies Speaker: Brad Messner, EA
	Track Two: Community Property Law Speaker: LG Brooks, EA, CTRS
	Track Three: Reconciling Clean Vehicle Credits - <u>Session Title Change</u> Speaker: Josh Youngblood, EA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: The Gig Is Up: Handling Income in Unique Industries Speaker: Brad Messner, EA and Matt Metras, EA
	Track Two: Hit a Home Run With Your California Tax Update Speaker: Patty Barron, EA
	Track Three: Successful Audits for Individuals, Rentals & Business Speaker: Jane Ryder, EA, CPA
12:00 PM to 1:20 PM	2025 Annual Business Meeting and Awards Ceremony Luncheon (Included with registration)
1:20 PM to 3:00 PM	Breakout Sessions:

	Track One: Tax Quest: The Ultimate Year-End Tax Planning Adventure Speaker: David Hilliard, EA, NTPI Fellow
	Track Two: California Property Tax Update Speaker: Frank Acuña, Attorney at Law
	Track Three: Intro to: FBAR, FATCA, and FinCEN Speaker: Claudia Stanley, CPA, EA
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Individual Tax Update Speaker: Tom Gorczynski, EA, USTCP <i>(Previously Monday at 3:20 PM)</i>
	<u>Wednesday, June 11, 2025</u>
7:00 AM to 5:00 PM	Registration and Exhibits
8:20 AM to 10:05 AM	Breakfast Keynote Session: Tax Stuff You Thought You Knew Speaker: Shannon Hall, EA and Ryan Reichert, EA, CFP
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: Retirement Tax Playbook: Navigating Key Tax Changes and Opportunities Speaker: David Hilliard, EA, NTPI Fellow
	Track Two: Digital Assets 101 Speaker: Matt Metras, EA
	Track Three: Fundamentals of Business Tax Balance Sheets Speaker: Jane Ryder, EA, CPA
12:00 PM to 1:20 PM	<i>Lunch and Learn: More information to come!</i>
1:20 PM to 3:00 PM	General Session Stump the Tax Experts Speaker: Speaker Panel

3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: 10 Commandments for Your Practice: Ethics Speaker: Claudia Stanley, CPA, EA
5:15 PM	Grand Prize Drawing

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



New Member Resource - Classified Ads!

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 Chapter Events

May 1, 2025

After Season Social

Hosted by the San Diego Chapter

NO CE OFFERED FOR THIS EVENT

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

May 6, 2025

Ethics & Practice for Tax Professionals

San Diego - East County Chapter In-Person Meeting

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

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

May 7, 2025

Social Security - IRMAA/Fairness Act

San Francisco Bay Chapter Virtual Meeting

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

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

May 8, 2025

Pesky Problems

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.

Ethical Practices for Tax Professionals

San Diego Chapter In-Person Meeting

This month's meeting will take place on a different date than our usual 3rd Thursday schedule.

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

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

May 14, 2025

When can Scams be Claimed as a Theft Loss?

San Jose Chapter Virtual Meeting

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

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

May 17, 2025

I want to Retire, but do I have the right Pension Plan/Annuities?

Orange County - South Chapter In-Person Meeting

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

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

May 21, 2025

Tax Season Recap: What went right, What went wrong, What can we learn?

Inland Empire Chapter Virtual Meeting

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

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

May 27, 2025

Part One: Unraveling the Mysteries of Clergy Taxes

Part Two: Charitable Contributions

Central Valley Chapter In-Person Meeting
4 Federal Law hours (Topics covering existing tax law)
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

May 28, 2025

Ethical Practices for Tax Professionals
Greater Long Beach Chapter In-Person Meeting
2 Ethics hour(s) (Topics meeting the ethics requirements under Cir 230)
[Click here](#) to learn more and register.

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

Welcome New CSTC Members!

Mary Avent
Central Valley

Luis Bravo
San Gabriel Valley

Patricia Claproth
Inland Empire

Jason Del Vecchio
Member-at-Large

Ji Ye Kim
San Diego-North County

Mark McRae
Greater Long Beach

Cynthia McVay
Inland Empire



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 reminder: Protect important records in case a natural disaster strikes](#)

IR-2025-55, April 30, 2025 — The Internal Revenue Service reminds taxpayers that disaster preparation season kicks off soon with National Wildfire Awareness Month in May and National Hurricane Preparedness Week, May 4-10.

[IRS highlights key forms, topics for tax-exempt organizations ahead of May 15 filing deadline](#)

IR-2025-54, April 25, 2025 — As the May 15 filing deadline approaches for tax-exempt organizations, the Internal Revenue Service highlights important forms and topics to ensure successful and timely filing.

[IRS Whistleblower Office releases operating plan outlining integrated approach to advance program](#)

IR-2025-53, April 18, 2025 — The Internal Revenue Service Whistleblower Office released its first-ever multi-year operating plan outlining guiding principles, strategic priorities, recent achievements and current initiatives to advance the IRS Whistleblower Program.

[IRS encourages taxpayers to check withholding now for next year](#)

IR-2025-52, April 17, 2025 — The Internal Revenue Service reminds taxpayers that proper tax withholding now is key to avoiding surprises when they file their tax return next year. Making any needed adjustments earlier in the year means taxpayers won't have to make a big change later in the year to catch up.

[Missed the April tax-filing due date? File promptly to minimize interest and penalties](#)

IR-2025-51, April 16, 2025 — The Internal Revenue Service encourages taxpayers who missed the filing deadline to submit their tax return as soon as possible.

[IRS marks 70th anniversary of April 15 tax filing deadline](#)

IR-2025-50, April 15, 2025 — On this Tax Day, the Internal Revenue Service marks a major milestone: the 70th Anniversary of the April 15 federal income tax filing deadline.

[IRS: All of Arkansas qualifies for disaster tax relief; various deadlines postponed to Nov. 3](#)

IR-2025-49, April 14, 2025 — The Internal Revenue Service today announced tax relief for individuals and businesses in the entire state of Arkansas affected by severe storms, tornadoes and flooding that began on April 2, 2025

[IRS: Need more time to file, request an extension](#)

IR-2025-48, April 14, 2025 — As the end of filing season approaches, the Internal Revenue Service reminds taxpayers who need more time to file that they should request an extension by the April 15 deadline.

[IRS: All of Tennessee qualifies for disaster tax relief; various deadlines postponed to Nov. 3](#)

IR-2025-47, April 14, 2025 — The Internal Revenue Service announced today tax relief for individuals and businesses in the entire state of Tennessee affected by severe storms, straight-line winds, tornadoes and flooding that began on April 2, 2025.

[More than \\$1 billion in 2021 tax refunds still unclaimed – Taxpayers should act now to see if they are eligible](#)

IR-2025-46, April 11, 2025 — The Internal Revenue Service today reminded the 1.1 million people who didn't file their tax year 2021 federal tax returns that they may be eligible for a refund if they file by the April 15 deadline.

[First quarter estimated tax payment deadline is April 15](#)

IR-2025-45, April 10, 2025 — The Internal Revenue Service reminds self-employed individuals, retirees, investors, businesses and corporations that April 15 is the deadline for first quarter estimated tax payments for tax year 2025.

[Last-minute filing tips, resources available to help taxpayers who still need to file](#)

IR-2025-44, April 10, 2025 — The Internal Revenue Service today reminded last-minute tax filers that the April 15 tax deadline is right around the corner, and there are a variety of free tools to help, including the Let Us Help You page on IRS.gov.

[IRS reminds taxpayers to access or create an IRS Online Account today](#)

IR-2025-43, April 9, 2025 — The Internal Revenue Service reminds taxpayers that it's not too late to access or create an individual IRS Online Account. An IRS Online Account makes it easy for people to quickly get the tax planning information they need.

[IRS: Act now to file, pay or request an extension](#)

IR-2025-42, April 8, 2025 — With the April 15 tax deadline fast approaching, Internal Revenue Service reminds taxpayers there is still time to file their federal income tax return electronically and request direct deposit of any refund.

[IRS reminder: Disaster victims in twelve states have automatic extensions to file and pay their 2024 taxes](#)

IR-2025-41, April 4, 2025 — The Internal Revenue Service today reminds individuals and businesses in area covered by 2024 disaster declarations that their 2024 federal income tax returns and tax payments for tax year 2024 are due on Thursday, May 1, 2025.

[Reminder to those who owe: Payment plan options are available](#)

IR-2025-40, April 3, 2025 — The Internal Revenue Service today reminds taxpayers that they don't need to wait until April 15 to file their 2024 federal return, and if they owe and are unable to pay the balance in full, there are payment plans available to help them pay their tax obligation.

[IRS reminder to U.S. taxpayers living, working abroad: File 2024 tax return by June 16](#)

IR-2025-39, April 2, 2025 — The Internal Revenue Service today reminded taxpayers living and working abroad that they have until Monday, June 16, 2025, to file their 2024 federal income tax return and pay any tax due.

[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.



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 Exceleerate America.

THANK YOU TO OUR 2024 SYMPOSIUM SPONSORS



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