



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

August 2026

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From the CSTC President

So, August sort of came out of nowhere, huh? The months seem to fly by faster and faster each year, and I find myself still, despite my best efforts, constantly saying “after [insert any deadline here] is done, things will calm down.” And they never calm down. I guess this is maybe just how it is now.

BUT, I did make some time recently for one of my favorite summertime festivities: the OC Fair. I am a closet table-scape fanatic, and I love the table setting competition. This year did not disappoint, and I left with some exciting new napkin folds to try out at my next dinner party. This month I will also be enjoying my favorite convention, Midsummer Scream, where all things Halloween gather for three days of shopping, panels, and mini haunted mazes. I cannot wait to stock up on new items for my October spooky round up.

I wish I could share exciting tax updates, but it’s been a bit of a slow year on that front. We finally got some guidance from the Office of Professional Responsibility (OPR) on how Circular 230 applies to AI use in our practices. Whether you like it or not (and sometimes even whether you know it or not) AI has made its way into just about all of our systems. It’s in our email, our tax software, and pretty much everywhere else. This means that we need to take steps to ensure that we are protecting our client data, and exercise due diligence when AI is being used. We can’t just take the AI output and assume that it is correct, because often it isn’t. AI can cut down the time it takes to find answers to complex tax questions, but we should have a firm “trust but verify” policy for those answers.

As we move into August, the final deadlines loom. September brings the end of pass-through entity extensions, and October is the official close of the individual filing season for 2026. If you’re still looking for hours to renew your credentials, now is the time to grab those hours. If you’re looking for update, California, Ethics, or anything else, be sure to check your local chapter to see what’s on the calendar. There is some great education planned all across the state, so whatever you need, we’ve got you covered.

Until next time, stay cool and be kind. We're all in this together.

Respectfully submitted,
Shannon Hall, EA

SAVE THE DATE FOR THE 2027 SUMMER SYMPOSIUM!



Upcoming Wednesday Webinar



IRS Problem Solving: A Practical Overview

10:00 AM to 12:00 PM PST

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

Wednesday, August 26, 2026

Presenter(s): Tom Gorczynski, EA, USTCP

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

IRS: 18QC1-T-02318-26-O

CTEC: 1000-CE-05810

Knowledge Level: Intermediate (Basic knowledge helpful)

Description:

Tax professionals regularly assist clients with IRS notices, balances due, audits, and other compliance issues. This course provides a foundational overview of IRS problem representation, focusing on the common issues practitioners encounter and the tools available to resolve them, including various IRS transcripts. Designed as a practical introduction, the course highlights how to prepare authorizations, analyze IRS problems, communicate effectively with the Service, and provide value to clients facing tax controversy.

Learning Objectives

- Describe the most common IRS problems faced by individuals and small business clients.
- Identify the primary tools and procedures available for resolving IRS issues.
- Explain best practices for communicating with the IRS on behalf of clients.
- Apply a step-by-step framework to evaluate and resolve a client's IRS problem.

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



CSTC Classified Ads - A Member Benefit

Position Wanted

Valiante Tax is seeking a motivated & meticulous Tax Preparer to join our growing team. Role entails communicating with clients, preparing individual tax returns, reviewing & loading returns through e-filing.

Link to job description: <https://valiantetfm.com/wp-content/uploads/2026/06/VTFM-Tax-Preparer-JBA-06.09.2026-1.pdf>

For more information, contact Jason Valiante at 714-710-3424

Practice for Sale

Small tax prep practice for sale in SF Bay Area. The gross revenue of ~\$ 50K is derived from 50+ individuals and several entities. Approximately 75% of clients remit their data electronically, while the rest of clients drop off or mail in their document with only a few people coming in.

For more information, contact Luda Lavrentieva at 510-558-9746

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 Chapter Events

August 4, 2026

Rental Real Estate: Advanced Tax Issues

San Diego - East County Chapter Virtual Meeting

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

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

August 5, 2026

Beyond the Brokerage Statement

San Gabriel Valley Chapter In-Person Meeting

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

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

Uncovering the Mystery of Schedule K-1

Temecula Valley Chapter In-Person Meeting

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

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

August 6, 2026

Unethical Minds

San Jose Chapter Virtual Meeting

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

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

August 7, 2026

Representation Regarding All Tax Matters

San Francisco Bay Chapter Virtual Meeting

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

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

August 10, 2026

California Itemized Deductions and California Nonconformity

Orange County - South Chapter Virtual Meeting

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

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

August 12, 2026

California Tax Update

Orange County Chapter In-Person Meeting

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

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

August 13, 2026

Leveraging the Tax Code to Build Advisory Services

North County San Diego Chapter & CSEA Palomar Chapter Joint In-Person Seminar

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

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

August 18, 2026

Unlocking §199A: QBI Deduction Planning

In-Person Meeting Hosted by the Region Four Chapters

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

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

August 19, 2026

Dr. Henry Jones, Jr., Case Study: Wages, Treasures, Stolen Goods, and Antiquities, OR, Would You Take This Client?

Inland Empire Chapter Virtual Meeting

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

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

August 24, 2026

California Limited Liability Company (LLC)

Orange County - South Chapter Virtual Meeting

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

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

August 25, 2026

Immigration 101 & Int'l Reporting Requirements for Tax Preparers

Central Valley Chapter Virtual Meeting

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

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

August 29, 2026

2026 SUMMER TAX FORUM

Orange County South Chapter In-Person Seminar

1 Ethics hour
1 Federal Tax Law Hour
3 Federal Update Hours
2 California Hours
[Click here](#) to learn more and register.

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

Welcome New CSTC Members!

Ronald Cheung
Orange County- South Chapter

Carmen Foltz
San Diego Chapter

Valentine Gednov
Orange County- South Chapter

Steven Gutierrez
San Gabriel Valley Chapter

Ernest Hicks
Orange County Chapter

Chamroeun Nuon
Greater Long Beach Chapter

Joaquim Resende
San Diego Chapter

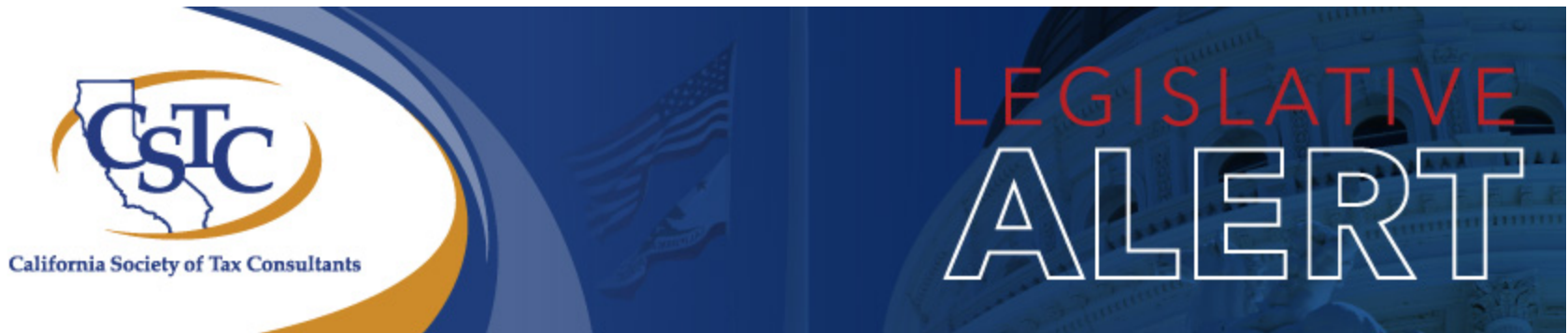
Efrain Sanchez
Greater Long Beach Chapter

Julia Sanchez
Greater Long Beach Chapter

Laura Sanchez
Greater Long Beach Chapter

Gretchen Shepard
San Gabriel Valley Chapter

Heather Sprauve
Member-at-Large



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 recognizes National Whistleblower Day with \\$8 billion recovered since 2007](#)

IR-2026-84, July 28, 2026 — The Internal Revenue Service today highlighted the upcoming National Whistleblower Day, and the important role whistleblowers play in exposing fraud, reducing the tax gap, and strengthening compliance.

[IRS simplifies penalty relief, introduces automatic process for eligible taxpayers](#)

IR-2026-83, July 8, 2026 — The Internal Revenue Service today announced a new automatic process to provide penalty relief for taxpayers with a history of filing and paying on time, reducing the need for them to request assistance.

[Treasury, IRS issue final regulations naming certain charitable remainder annuity trust transactions as listed transactions](#)

IR-2026-82, July 8, 2026 — The Department of the Treasury and the Internal Revenue Service today issued final regulations identifying certain arrangements purporting to be Charitable Remainder Annuity Trusts as listed transactions.

[IRS, Security Summit launch summer series to help tax pros protect clients from identity theft](#)

IR-2026-81, July 7, 2026 — The IRS and Security Summit partners today launched the summer “Protect Your Clients; Protect Yourself” campaign, a five-week series highlighting practical steps tax professionals can take to protect client data, their businesses, and themselves from evolving tax-related identity theft threats.

[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.

Introducing a New CSTC Member Benefit!

AskTomG.AI

Ethical research the way Tom teaches it.

Take your tax research to the next level with AskTomG.AI, a research platform built specifically for tax professionals by Thomas A. Gorczynski, EA, USTCP, and Joshua Youngblood, EA, CRETS. Members receive guided, authority-based research, transparent source citations, a built-in tax research library, and



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.



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).



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



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Wolters Kluwer: Discounts on Tax, Accounting & Audit Resources, Software, Information & Services.



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-

automatically generated, time-stamped research memos to help document their analysis. Best of all, CSTC members receive 15% off their subscription along with a 24-hour free trial to explore the platform risk-free.

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

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

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