



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

August 2025

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From the CSTC President

And just like that it's August!

I have to be honest with you, I'm TIRED. I do this every year. I make plans thinking that I have it all under control and then find myself feeling like no matter how hard I push there is just no getting ahead of the tsunami of work. Even the fun things start to feel stressful because they are keeping me from getting work done.

I say every year that I am going to make changes, and I really do try, but somehow...

I will never complain about being busy, because it is definitely better than the alternative. I remember back when I went all in on taxes and quit my "day job" waiting tables in a 50s diner that first tax season I spent hoping that there would be enough clients to keep the lights on. There were, and then some. Which is kind of how it goes in this business. It grows almost without you noticing until one day you find yourself surrounded by towering piles of manila folders (or whatever the virtual equivalent is) wondering how you can possibly get it all done.

And it's okay to feel that way. It's okay to feel overwhelmed and to question your life choices and think about chucking it all and running away to open up a roadside museum dedicated to the art of soap carving.

If you feel, or have ever felt, like I sometimes (often) do, you're not alone, and you don't have to go through it alone. This is the place to find the friends who will talk you off the ledge when things get hectic. This is the place to build a community that knows exactly what you're going through.

And here you thought I was going to talk about OB3!

Don't worry. There's plenty of that coming.

Okay, I guess I can't resist!

There is SO MUCH bad information out there about OB3 and the new provisions, so when you seek out education to prepare yourself for the coming changes, make sure that you go to trusted sources who have done the work to analyze the implications of the bill. Make sure that you are learning the version that actually passed and was signed, and not an older version (I have seen that out there, so be vigilant).

If you're ever in doubt about whether a presenter is giving you solid info, you can follow my easy rule: "Citations, or it didn't happen."

Until next time, stay cool, and stay informed!

Respectfully submitted,

Shannon Hall
President



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!



CSTC Classified Ads - A Member Benefit

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 Chapter Events

August 1, 2025

We Care to Share: Practice Management and Dinner Meeting: Dissolutions
San Diego - East County Chapter In-Person Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

August 6, 2025

Retirement Tax Playbook: Navigating Key Tax Changes and Opportunities
San Gabriel Valley Chapter In-Person Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

Ethics
Temecula Valley Chapter In-Person Meeting
2 Ethics hour(s) (Topics meeting the ethics requirements under Cir 230)
[Click here](#) to learn more and register.

August 8, 2025

Penalty Abatement/Tax Solutions
San Francisco Bay Chapter Virtual Meeting
4 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

August 13, 2025

Vulnerable Voices: Ethical Duties When Clients Can't Speak for Themselves
San Jose Chapter Virtual Meeting
2 Ethics hour(s) (Topics meeting the ethics requirements under Cir 230)
[Click here](#) to learn more and register.

Qualified Charitable Distributions
Orange County Chapter In-Person Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register

August 14, 2025

The One, Big, Beautiful Bill
Central Valley Chapter Virtual Meeting
2 Federal Tax Update hour(s) (Topics covering new tax law)
[Click here](#) to learn more and register

August 18, 2025

Business Tax Boot Camp - Qualified Joint Venture (QJV)
Orange County - South Chapter Virtual Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register

August 19, 2025

Retirement- Cal Savers rules and more
Sacramento Chapter In-Person Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

August 20, 2025

1031 Exchanges for the Tax Professional
Inland Empire Chapter Virtual Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

August 21, 2025

Depreciation 101- Make sure you are getting the most out of depreciation
San Diego Chapter Virtual Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

August 23, 2025

2025 SUMMER TAX FORUM

Orange County South Chapter In-Person Seminar

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

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

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

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

August 26, 2025

Two-Part Meeting: Weird Science: Ethics & the Misuse of A.I. in Tax Practice and Getting Started with Chat GPT and Interests & Dividends 1040 Schedule B

Central Valley Chapter Virtual Meeting

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

Part One: 2 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.

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

Welcome New CSTC Members!

Reynalda Becerra

San Diego-East County Chapter

Mayu Daley

Greater Long Beach Chapter

Jeannie Hambric

Orange County Chapter

Gordon Ewy

Central Valley Chapter

Shannon Grasso

San Francisco Bay Chapter

George Kakouris

Orange County Chapter

Sharon Kofoed

Temecula Valley Chapter

Kristin Mettler

Temecula Valley Chapter

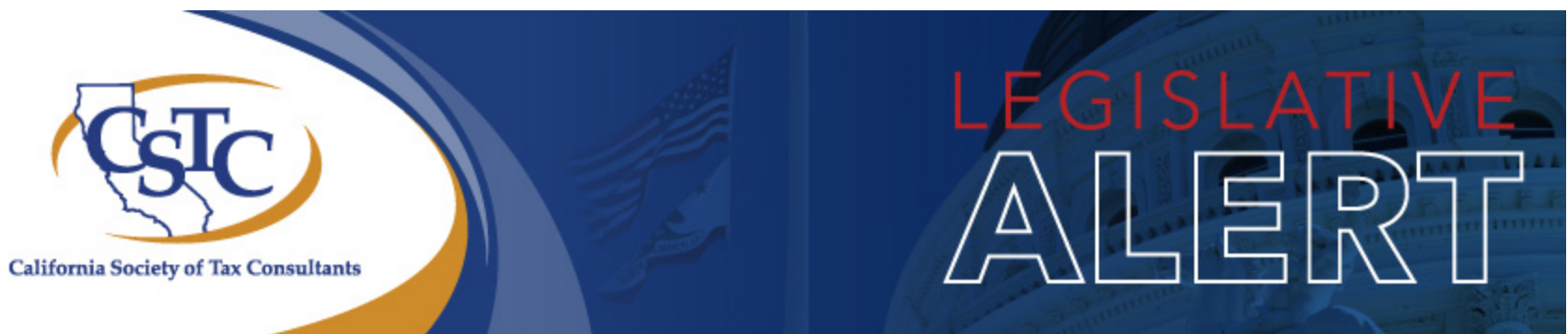
Teresita Otanez
Greater Long Beach Chapter

Mario Peralta
Los Angeles Chapter

Urzula Rocha
Orange County Chapter

Darlana Tran
Greater Long Beach Chapter

Julie Zelaya
Los Angeles Chapter



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, Security Summit remind tax pros they must have a Written Information Security Plan to protect client data](#)

IR-2025-79, July 29, 2025 — The Internal Revenue Service and its Security Summit partners today reminded tax professionals about the federal mandate to have a Written Information Security Plan (WISP) designed to help protect them against threats from identity thieves and data breaches.

[IRS Whistleblower Office celebrates National Whistleblower Day](#)

IR-2025-78, July 28, 2025 — In anticipation of National Whistleblower Appreciation Day on July 30, the Internal Revenue Service Whistleblower Office recognizes the important role whistleblowers continue to play in supporting the nation's tax administration.

[IRS issues interim guidance to improve Large Business & International examination process](#)

IR-2025-77, July 25, 2025 — The Internal Revenue Service today issued a memorandum highlighting changes aimed at reducing case cycle times for corporate taxpayers, making examinations more customer-driven, consistent and efficient.

[IRS offers summer help for late filers](#)

IR-2025-76, July 22, 2025 — The Internal Revenue Service reminds taxpayers who missed the April deadline that help is still available.

[Tax pros should watch out for phishing emails and other attacks, Security Summit warns](#)

IR-2025-75, July 15, 2025 — The Internal Revenue Service and Security Summit partners warn tax professionals to be wary of evolving phishing emails and other schemes to steal sensitive taxpayer data and offer steps tax pros can take to protect sensitive taxpayer information.

[IRS urges extension filers to use IRS Free File this summer](#)

IR-2025-74, July 10, 2025 — The Internal Revenue Service encourages taxpayers who requested an extension to file their returns now rather than wait until the Oct. 15 deadline. IRS Free File makes it easy.

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

IR-2025-73, July 1, 2025 — With new scams continuing to emerge, the Internal Revenue Service and the Security Summit partners today announced the start of the special summer Protect Your Clients; Protect Yourself campaign to help tax professionals protect themselves against new and ongoing threats involving tax-related identity theft.

[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.



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:

FOLLOW CSTC ON SOCIAL MEDIA!

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

