

**CALIFORNIA SOCIETY OF TAX CONSULTANTS  
INLAND EMPIRE CHAPTER  
Educational Dinner Meeting  
Wednesday, October 16, 2019**



California Society of Tax Consultants  
Inland Empire Chapter

We meet at the DoubleTree Hotel, 555 W Foothill Blvd, Claremont, CA 91711

## Marijuana Taxation in California

IRS Program #: 18QC1-T-01245-19-I, CTEC #: 1000-CE-4629—2 hours credit (1 hour Federal Tax & 1 hour CA)—Basic

On January 1, 2018 California became the ninth state in the U.S. to legalize the recreational use of marijuana. With over 40 million people living in California, this state is home to the largest legal market for marijuana in the country. The purpose of this course is to provide practitioners with a basic understanding of the unique tax implications and reporting requirements of deal “cannabis

based” businesses. In this course, you will learn:

- The challenges in dealing with a cash intensive businesses
- What is IRC 280E?
- Form 8300 reporting requirements
- Learn about the sales, excise, and cultivation taxes applicable in California

### PRESENTER: William Rogers, MBA, CFP, EA



William E. Rogers is the founder of ASCEND Business Advisory, a small tax and financial advisory firm in Rancho Santa Fe, CA. He is passionate in helping businesses eliminate the hassles of running their business. He earned a Bachelor’s degree in Business Management from the University of Redlands, an MBA from the University of Southern California, and an MS in Finance from Golden Gate University. He is also a Certified Financial Planner and an Enrolled Agent before the Internal Revenue Service. He has served as the Past President of the North County Chapter of the California Society

of Tax Consultants, Past President of the Palomar Chapter of the California Society of Enrolled Agents, and served as a Director for the California Society of Enrolled Agents. Over the past eighteen years Mr. Rogers has developed extensive experience in advising e-commerce businesses. He counsels entrepreneurial ventures in a broad array of areas such as accounting, tax, finance, and strategic planning. Finally, he has been a featured speaker for the Learning Annex, Further Ed, the California Society of Tax Consultants, the California Society of Enrolled Agents, and has authored courses on behalf of the National Association of Enrolled Agents.



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This presentation has been designed to meet the requirements of the Director of Practice of the Internal Revenue Service; the California State Board of Accountancy; and the California Tax Education Council including code 31 of Federal Regulations 10.6(g). This does not constitute an endorsement by these groups. A listing of additional requirements to renew tax-preparer registration may be obtained by contacting CTEC at PO Box 2890, Sacramento, CA 95812-2890, or phone CTEC at 1-877-850-2832, or on the Internet at [www.ctec.org](http://www.ctec.org).

## MEETING LOCATION

**DoubleTree Hotel Claremont**  
555 W Foothill Blvd, Claremont, CA 91711  
Wednesday, October 16, 2019

Sign-in: 5:30 pm to 6:00 pm  
Dinner: 6:00 pm to 7:00 pm  
Speaker: 7:00 pm to 9:00 pm

### MEETING COST (dinner and 2 hours of education)

- **\$35 for members with reservations made on or before Saturday, October 12, 2019, 11:59 pm**
- **\$50 for non-members, walk-ins and late registrations**

**To make a reservation call: 909.575.1066** (message phone) OR email: [CSTC.Inland.Empire@gmail.com](mailto:CSTC.Inland.Empire@gmail.com). Please leave your name, PTIN and your EA, CTEC or CPA #, and menu preference when making your reservation. Pay at the event with check or cash (we are not able to accept credit cards). **Please Note:** Dinner is served at 6:00 pm, should you arrive after 6:30 pm a meal may not be guaranteed for you.



## == MENU ==

House Salad with Ranch and Italian dressings  
Fresh Rolls and Butter

### Main Menu:

- **Baked White Fish with lemon pepper**  
Chef’s Choice Starch  
Chef’s Choice Vegetables  
*OR*
- **Large entrée size Baked Potato**  
With the following vegetarian toppings on the side:  
Cheeses, Steamed Broccoli, Butter,  
Sour Cream and Chives

Coffee, Ice Tea  
Chef’s Choice Dessert

If you signed up for our new 2019 permanent dinner list at the May 15, 2019 meeting, you do not have to call in your reservation. However, if you are on the list and are unable to attend please call and cancel, as a meal will be ordered for everyone on the list and we will be billed for all meals ordered. If you are not on the list and made a reservation and are unable to attend, you must cancel your reservation by **Saturday, Oct 12, 2019 11:59 pm otherwise you will be billed for the dinner.** 909.575.1066 OR [CSTC.Inland.Empire@gmail.com](mailto:CSTC.Inland.Empire@gmail.com)