



CSTC INLAND EMPIRE CHAPTER REPORT FOR NOVEMBER 16, 2020 SOCIETY BOARD OF DIRECTORS MEETING

1. MEETING SCHEDULE:

2020 CHAPTER MEETINGS AUGUST - DECEMBER Third Wednesday of each month 6:00 pm – 8:00 pm

Date

May 20, 2020, June 17, 2020, and July 15, 2020 CANCELLED DUE TO COVID-19

AUG19, 2020 VIRTUAL —**Topic:** “Bankruptcy Secrets” **Speaker:** Gary Quackenbush, Esq

SEPT 16, 2020 VIRTUAL —**Topic:** “Estate Planning and Taxes” **Speaker:** John K Bishop, Esq.

OCT 21, 2020 VIRTUAL —**Topic:** “Maximizing QBI” **Speaker:** Jane Ryder, EA, CPA

NOV 18, 2020 VIRTUAL —**Topic:** “When a loved one has died” **Speaker:** Frank Acuna, Esq

DEC 16, 2020 VIRTUAL - **Topic:** “Hall of Tax Curiosities updated” **Speaker:** Shannon Hall, EA

Note: CSTC Inland Empire Chapter Members who attend at least 2 hours of any CSTCAcademy virtual classes in lieu of each June and July cancelled meeting will receive attendance credit towards a free Tax Book.

Our Virtual Meetings have been successful with an increase in attendance compared to our in-person meetings. Besides our chapter members we had other chapter members and between 8 and 14 non-members attend. Attendance in August was 65, September 69 and October 47.

Our Annual Update Workshop has also been changed to a VIRTUAL EVENT!
We will have the Federal Update on Saturday, January 9, 2021 and the CA Update on Monday, January 11, 2021.

TAX YEAR 2020 UPDATE WORKSHOP

8 hours CPE credit – 6 hours Federal Update and 2 hours California Update

- **Saturday January 9, 2021** Speaker: Claudia Stanley, CPA, EA – Federal Update
- **Monday, January 11, 2021** Speaker: Marc Narlesky, Technical Asst. to the Advocate
FTB – California Update

Cost Members: \$99 reservations and payment by Dec 31, 2020, After Dec 31, 2020 \$149.

Cost Non-Members: \$149 reservations and payment by Dec 31, 2020, After Dec 31, 2020 \$179.

2. MEMBERSHIP REPORT

The November 2, 2020 Membership list we received shows that we have:

- **78 members, this includes 4 new members who joined in October**
- 7 members appeared on the graced list.
- We will be contacting the members on the graced list.

3. NEW IDEAS TO SHARE WITH OTHER CHAPTERS

Many of our members miss the personal contact. We added **VIRTUAL** Breakfast meetings **via Zoom** starting in October. The meetings are non-credit, round table discussions. Participants can talk and see each other **just NOT in person**. Challenging and interesting tax issues, recent changes in the tax laws can be discussed and better defined.

12 members attended in October and 6 members attended in November. We will increase our reminders from one to 2 or 3 before the next meeting. Hopefully, this will create more awareness and attendance.

4. CHAPTER CONCERN

None

5. INLAND EMPIRE BOARD OF DIRECTORS

Inland Empire Board of Directors July 1, 2020 – June 30, 2021

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| • President | Mathilde “Hilde” Morrow |
| • Vice President | Ann Mills |
| • Secretary | Armando Armenta |
| • Treasurer | Duberly Beck |
| • Past President (not an elected position) | Renee McClellan |
| • Newsletter Editor | Mathilde “Hilde” Morrow |
| • Director – Asst. Treasurer | David “Dave” Knutson |
| • Director – Membership | Laura Jimenez |
| • Director – Member at Large | Priscilla “Pris” Lerma |

Respectfully submitted,

Hilde

Mathilde “Hilde” Morrow, President

CSTC Inland Empire Chapter

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