



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

July 2026

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From the CSTC President

First off, I want to say thank you to everyone who came out to the 2026 Summer Symposium. It was so great to be able to connect with so many of our members and to get some pretty great education along the way. I also want to acknowledge our amazing sponsors and exhibitors: Accounting & Tax Brokerage, Brass Tax Presentations, CFS, The Gorczynski Group, Taxware Systems, and the IRS.

In case you missed it, we announced our 2027 theme and I am SO EXCITED to invite you to save the date for Camp CSTC! We're back at the Silver Legacy June 6-9th for S'more fun and education.

It's been an exciting summer so far for IRS guidance. We finally have some answers about the treatment of TCJA-era QOZ investments and as I write this new guidance has dropped regarding Trump accounts and gift tax. We also got the draft of the 2026 Schedule A, and it is TWO PAGES NOW!?! Oh, and we also got OPR Alert 2026-19 that lays down some highly anticipated guidelines for the use of AI in tax practice. The section on pricing is sure to be a topic of much discussion over the next few months. If you use AI in your practice (and let's face it, who doesn't at this point), make sure you're doing it responsibly.

Testing for the 2026 Enrolled Agent exam officially begins with the new exam proctor PSI July 1, and for the first time the exam will be available remotely. The new options come with a price hike, so if you're taking the exams this year make sure to budget a bit more than in years past.

As we move into the last half of the year, I hope that you are taking some time to enjoy the summer weather and get outside once in a while. I was able to sneak a quick camping weekend in between conferences last month and I remembered how

restorative spending time in nature can be. We're no good to our clients if we're burned out, so find the opportunities to recharge when you can.

We have a summer and fall jam-packed with opportunities to network with colleagues and get those CE hours, so check the calendar to see what's coming up in your area.

I hope to see you at a meeting soon!

Until next month,

Shannon Hall, EA
CSTC President

SAVE THE DATE FOR THE 2027 SUMMER SYMPOSIUM!



Upcoming Wednesday Webinar



Maximizing QBI 199A Deduction Refresher & Update!

10:00 AM to 12:00 PM PST

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

Wednesday, July 15, 2026

Presenter(s): Jane Ryder, EA, CPA

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

IRS: 18QC1-T-02304-26-O

CTEC: 1000-CE-05790

Knowledge Level: Intermediate (Basic knowledge helpful)

Description:

Maximizing the QBI deduction, 199A, includes planning, structuring and strategizing for different types of businesses, SSTBs and entities, S corps, Partnerships, Sole Proprietorships, rentals, related entities and some trusts. Evaluating and comparing options including the increased phase out range and new minimum QBI deduction provision from OBBBA offers substantial tax savings.

Learning Objectives

1. Develop skills to maximize QBI for S Corps, Partnerships, Sole Proprietors, Rentals, & trusts.
2. Learn QBI strategies related to compensation, health insurance, self-rental, related businesses, multiple income streams, global income and more.
3. Identify best practices to support positions taken to maximize QBI and be prepared to defend QBI in an audit.
4. Understand the new minimum QBI deduction from OBBBA.
5. Accurately report sale, conversion, exchange or other dispositions of real estate.

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

Member of the Year
2026 Recipient - Jane Ryder



The MOY award is CSTC's highest honor and acknowledges an outstanding individual for their extraordinary efforts in supporting CSTC and its members.

The 2026 MOY is someone we are all very familiar with. This member is a wealth of tax knowledge and finds joy in sharing it whenever asked. This member will drop everything to help anyone who needs it and is amazingly supportive of the people they care about. If called upon with questions, this member will not only have an answer for you, it will also be the right answer, complete with an entertaining antidote to make it relatable.

This San Diego based Member is a CPA who has been providing tax, accounting, and collection resolution services since 1980, and who has earned a BS in Business Administration from SDSU and is currently licensed with the California State Board of Accountancy and admitted to practice before the Internal Revenue Service as an Enrolled Agent.

This member joined CSTC in 2016 and has provided 100s of hours of tax education via state-wide chapter meetings, Wednesday Webinars, Fall Forum classes and Summer Symposium sessions. This member really gets around, in fact the only place you won't find this member is on the freeways or on a plane.

"And I'll tell you something else" – this member may often be heard saying "what's my name", but all know exactly who SHE is, so "quick a bunny" come up here and claim this well-deserved award Jane Ryder.

Chapters of the Year!

Each year, CSTC celebrates the chapters that have shown exceptional dedication to growing our membership. Between July 1, 2025, and June 10, 2026, several chapters stood out for their recruitment efforts. We're proud to recognize the chapters that welcomed the most new members into the CSTC community this year:

Third Place

- Orange County Chapter – 10 new members

Second Place

- **Central Valley Chapter** – 11 new members

🏆 **First Place**

- **Greater Long Beach Chapter** – 14 new members

Thank you to all chapters for your ongoing commitment to growing and strengthening CSTC!

Congratulations to the 2026 Society Board of Directors

President, Shannon Hall

1st Vice President, Hasani James

2nd Vice President, Heather Santineau

Secretary, Melissa Mora

Treasurer, Peter Cullen

Region One Director, Karen DeVaney

Region One Director, Claudia Stanley

Region Two Director, Charles Copeland

Region Three Director, Patrick Kennedy

Region Four Director, Jeffrey Halbert

Immediate Past President, Linda Dong

California Tax Education Council (CTEC) State Representative, Karen DeVaney



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

July 1, 2026

Partnerships

Temecula Valley Chapter In-Person Meeting

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

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

July 8, 2026

Tax Quest 2: Return of the Tax Cuts

San Gabriel Valley Chapter In-Person Meeting

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

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

Employee Stock Benefits: ISOs, ESPP, NSOs, RSUs, RSAs, and Elections

Orange County Chapter In-Person Meeting

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

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

Trump Accounts - What You Need to Know

San Francisco Bay Chapter Virtual Meeting

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

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

July 9, 2026

Ethics & Practice for Tax Professionals

North County San Diego Chapter In-Person Meeting

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

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

July 13, 2026

CA Nonresidents and Part-Year Residents

Orange County - South Chapter Virtual Meeting

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

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

July 15, 2026

Uncovering the Mystery of Schedule K-1

Inland Empire Chapter In-Person Meeting

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

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

July 16, 2026

California Tax Updates

San Diego Chapter Virtual Meeting

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

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

Retirement Plans, Solo 401(k) Plan and Secure Act 2.0

San Jose Chapter Virtual Meeting

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

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

July 18, 2026

Trust Administration for Tax Professionals

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

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

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

July 23, 2026

California Update

San Jose Chapter Virtual Meeting

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

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

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

Welcome New CSTC Members!

Mansoor Dinga

San Jose Chapter

Walberto Lopez

San Diego-North County Chapter

Imran Rehman

San Francisco Bay Chapter

Duc Truong

Orange County Chapter

David Woods

San Diego 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.



[Treasury, IRS provide safe harbor for certain contributions to Trump Accounts under the Working Families Tax Cuts](#)

IR-2026-80, June 29, 2026 — The Department of the Treasury and the Internal Revenue Service today issued Revenue Procedure 2026-25 providing a gift tax reporting safe harbor for certain contributions to Trump accounts created under the Working Families Tax Cuts.

[National Taxpayer Advocate issues 2026 mid-year report to Congress](#)

IR-2026-79, June 24, 2026 — National Taxpayer Advocate Erin M. Collins today released her Fiscal Year 2027 Objectives Report to Congress, highlighting a largely successful 2026 filing season in which the IRS processed nearly 139 million individual tax returns, issued more than 90 million refunds, and successfully implemented extensive tax law changes despite significant operational challenges.

[IRS to offer final Saturday hours at Taxpayer Assistance Centers nationwide June 27](#)

IR-2026-78, June 22, 2026 — The Internal Revenue Service today announced select Taxpayer Assistance Centers will be open Saturday, June 27, for the final Saturday service event of 2026.

[Electronic Tax Administration Advisory Committee 2026 Annual Report includes recommendations to Congress and IRS](#)

IR-2026-77, June 17, 2026 — The Internal Revenue Service Electronic Tax Administration Advisory Committee released its 2026 annual report today with a total of 18 recommendations – six of which are directed to Congress.

[More than half the U.S. States signed up to participate in the federal scholarship tax credit program enacted under the One, Big, Beautiful Bill](#)

IR-2026-76, June 8, 2026 — The IRS announced that 27 states have elected to participate in the Federal Scholarship Tax Credit (FSTC) program, which enables eligible taxpayers to claim a federal tax credit for qualified contributions to Scholarship Granting Organizations (SGOs) providing scholarships for qualified elementary and secondary education expenses.

[IRS and Security Summit partners announce new framework to better protect taxpayers and tax revenue from fraud](#)

IR-2026-75, June 8, 2026 — The Internal Revenue Service and Security Summit partners today announced a restructuring of the public-private partnership designed to strengthen protections and enhance information sharing across the tax system.

[IRS describes agency's activities in fiscal year 2025 Data Book](#)

IR-2026-74, June 5, 2026 — The Internal Revenue Service today issued the 2025 Data Book detailing the agency's activities during fiscal year 2025.

[Treasury, IRS announce intent to issue proposed regulations for excise tax on excess tax-exempt organization executive compensation under the One, Big, Beautiful Bill](#)

IR-2026-73, June 5, 2026 — The Department of the Treasury and the Internal Revenue Service today issued Notice 2026-36 announcing intent to issue proposed regulations addressing the tax on excessive compensation and excess parachute payments to employees of tax-exempt organizations under the One, Big, Beautiful Bill.

[IRS announces nationwide hiring events for customer service representatives and tax examining technicians](#)

IR-2026-72, June 4, 2026 — The Internal Revenue Service today announced a series of hiring events to take place across the country through July.

[It's not too late; use IRS Free File today](#)

IR-2026-71, June 2, 2026 — The Internal Revenue Service reminds taxpayers who missed the filing deadline that they can still file their 2025 federal tax return at no cost using IRS Free File.

[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.

****NEW MEMBER BENEFIT****



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.



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 THE 2026 SUMMER SYMPOSIUM SPONSORS AND EXHIBITORS

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EXHIBITORS

**CFS Tax
Software**

**CSTC
Membership**

**The Gorczynski
Group**

**The Internal
Revenue Service**