



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

June 2026

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From the CSTC President

It's June! Which means that conference season is officially underway! We are just about a week away from our annual Summer Symposium, which means that if you haven't signed up yet there's still plenty of time to follow the yellow brick road to Reno.

We have an amazing education schedule lined up, as well as opportunities to network with tax pros from across the state and beyond. And we may have a surprise or two in store.

This is one of my favorite events of the year. I go to a lot of conferences (like, a LOT) and there is something really special about the CSTC Symposium. I think one of the things that makes us unique is that fact that we are not specific to any one credential. You may be standing next to a CTEC preparer in the line for the breakfast buffet, eating lunch with an Enrolled Agent, toasting with a CPA at the exhibitor reception, and then sharing a blackjack table with a USTCP after the sessions end for the day. There may even be an attorney or two huddled around the coffee station. The diversity of credentials among our members gives you the chance to tap into resources for areas of practice you hadn't even considered before. It also means that when you have a tax question, you're pretty much guaranteed to find an answer from the CSTC crowd.

It's also the 60th anniversary of CSTC! It's been six decades of tax professionals coming together to lift up the profession and each other. I am humbled and proud to be able to serve this organization, and I look forward to raising a glass to 60 years of excellence with all of you.

See you in Reno!

Shannon Hall
CSTC President



REGISTRATION IS OPEN FOR THE 2026 SUMMER SYMPOSIUM!

JUNE 7 - 10, 2026
SILVER LEGACY RESORT CASINO
RENO, NEVADA

CLICK HERE TO LEARN MORE AND REGISTER TODAY!

Summer Symposium Schedule-at-a-Glance

	Sunday, June 7, 2026
3:00 PM to 5:00 PM	Registration Open; Exhibitor Set-up
5:30 PM to 6:00 PM	Welcome Reception for First-Time Attendees
6:00 PM to 7:00 PM	Welcome Reception (light appetizers will be served) This event is family-friendly. (Included with full registration. Guest registration for this event is \$125)
	Monday, June 8, 2026
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	Breakfast Keynote Session: IRS Keynote Session Speaker: TBA
9:15 AM to 10:05 AM	Breakout Sessions:
	Track One: The Entity – Basics of Business Returns Speaker: Shannon Hall, EA
	Track Two: There’s No Place Like College: Tax Planning for Education Speaker: Brad Messner, EA
	Track Three: QBI Deduction Refresher & Update! Speaker: Jane Ryder, EA, CPA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:

	Track One: 2026 Digital Asset Tax Update Speaker: Matt Metras, EA
	Track Two: You think you know California Residency? Sure, and Dorothy thought she was in Kansas Speaker: Patricia Barron, EA
	Track Three: Navigating Rentals & Passive Activity Losses Speaker: Natalie Kolodij, EA, CRETS
12:00 PM to 1:20 PM	<i>Lunch and Learn:</i> <i>No CE Offered for this Course</i>
1:20 PM to 3:00 PM	Breakout Sessions:
	Track One: Short-Term Rentals: Fact from Fiction Speaker: Natalie Kolodij, EA, CRETS
	Track Two: Practical Digital Asset Reporting - How to make the most of software Speaker: Matt Metras, EA
	Track Three: California Individual Tax Update Speaker: Patricia Barron, EA
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Individual Tax Update Speaker: Tom Gorczynski, EA, USTCP
5:00 PM to 6:30 PM	Reception with Exhibitors
	<u>Tuesday, June 9, 2026</u>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	FTB Breakfast Keynote: California Tax Updates Speaker: Victoria A Ramirez, CPA, Advocate Technical Advisor, Taxpayers' Rights Advocate's Office
9:15 AM to 10:05 AM	Breakout Sessions:
	Track One: Click Your Heels and Automate: AI for Estimated Tax Projections Speaker: Brad Messner, EA

	Track Two: Dependency In-Depth Speaker: Shannon Hall, EA
	Track Three: Taming the Flying Monkeys: Effectively Responding to IRS Notices Speaker: Josh Youngblood, EA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: Filing Status: Rules and Planning Speaker: Tom Gorczynski, EA, USTCP
	Track Two: There's No Place Like Relief: Understanding Innocent Spouse Rules Speaker: Josh Youngblood, EA
	Track Three: Tax & Compliance for Not-for-Profit Organizations Part One Speaker: Veronica Marelli, EA
12:00 PM to 1:20 PM	2026 Annual Business Meeting and Awards Ceremony Luncheon (Included with registration)
1:20 PM to 3:00 PM	Breakout Sessions:
	Track One: Tax & Compliance for Not-for-Profit Organizations Part Two Speaker: Veronica Marelli, EA
	Track Two: Sale of A Residence Speaker: Tom Gorczynski, EA, USTCP
	Track Three: Farming: Alfalfa to Zebras to Deadly Poppies Speaker: Brad Messner, EA
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Business Tax Update Speaker: Jane Ryder, EA, CPA
	<u>Wednesday, June 10, 2026</u>
7:00 AM to 5:00 PM	Registration and Exhibits
8:20 AM to 10:05 AM	Breakfast Keynote Session: Closing a Practice Speaker: Tom Gorczynski, EA, USTCP, Josh Youngblood, EA, and Shannon Hall, EA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors

10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: GIG Economy Tax Compliance, Tax Savings and Form 1099-K Speaker: Jane Ryder, EA, CPA
	Track Two: Estate Planning After the OBBBA Speaker: Frank Acuña, Attorney at Law
	Track Three: Summary Judgement: Lessons Learned from the US Tax Court Speaker: Matt Metras, EA
12:00 PM to 1:20 PM	<i>Lunch and Learn</i> <i>No CE Offered for this Course</i>
1:20 PM to 3:00 PM	General Session: Stump the Tax Experts Speaker: Speaker Panel
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Assisting Clients with Estate Planning Needs - Ethically! Speaker: Frank Acuña, Attorney at Law
5:15 PM	Grand Prize Drawing

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

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



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

June 2, 2026

California Updates

San Diego - East County Chapter In-Person Meeting

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

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

June 3, 2026

How About 1031 Exchanges and Uncommon Applications

San Francisco Bay Chapter Virtual Meeting

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

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

Post Tax Season Update
Temecula Valley Chapter In-Person Meeting
2 Federal Tax Update hour(s) (Topics covering new tax law)
[Click here](#) to learn more and register.

June 17, 2026

Mastering Schedules M-1 and M-2: A Deep Dive into Form 1120S for S Corporations
Inland Empire Chapter Virtual Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

June 18, 2026

Stock options - ISO, NSO, 83b election, QSBS, RSU
San Diego Chapter Virtual Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

June 23, 2026

Tax Planning for Remote Workers
Central Valley Chapter Virtual Meeting
1 Federal Law hour(s) (Topics covering existing tax law)
1 California hour(s) (Topics covering California law issues)
[Click here](#) to learn more and register.

June 29, 2026

Depreciation 179, MACRS and Bonus Depreciation
Orange County - South Chapter Virtual Meeting
3 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!

Eleazar Aguirre
Central Valley Chapter

Guadalupe Cazarez
Inland Empire Chapter

Marcela Earley
San Diego Chapter

Luz Serrato
Orange County Chapter



LEGISLATIVE ALERT

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.



NEWS FROM THE IRS

[IRS releases new look-back interest calculator for long-term contracts](#)

IR-2026-70, May 29, 2026 — The Internal Revenue Service today announced the release of a new calculator to help businesses working on large, multi-year construction or manufacturing projects more easily figure interest related to those contracts.

[Treasury, IRS issue Section 892 proposed regulations to provide grandfathering protection and transitional relief to sovereign investors](#)

IR-2026-69, May 29, 2026 — The Department of the Treasury and the Internal Revenue Service today issued additional guidance addressing the applicability dates of recent proposed regulations under Section 892 of the Internal Revenue Code, which exempts foreign governments, including sovereign wealth funds, from tax on certain income derived from passive U.S. investments.

[Taxpayers can now view and submit Trump Account elections in their IRS Individual Account](#)

IR-2026-68, May 28, 2026 — The IRS today announced new features in IRS Individual Accounts that allow taxpayers to view and submit Trump Account elections, making it easier to invest in these tax-advantaged accounts.

[IRS to offer Saturday hours at Taxpayer Assistance Centers May 30](#)

IR-2026-67, May 27, 2026 — The Internal Revenue Service today announced it will offer Saturday hours at select Taxpayer Assistance Centers on May 30.

[IRS CEO Frank J. Bisignano visits Ohio to tout Working Families Tax Cuts provisions on no tax on car loan interest, no tax on overtime, enhanced deduction for senior citizens](#)

IR-2026-66, May 22, 2026 – Internal Revenue Service Chief Executive Officer Frank J. Bisignano and Senator Bernie Moreno (OH) toured the Cleveland area today to highlight Working Families Tax Cuts Act provisions on no tax on car loan interest, no tax on overtime, and the enhanced deduction for seniors.

[IRS announces terms of a time-limited settlement opportunity for eligible taxpayers involved in conservation easement disputes](#)

IR-2026-65, May 13, 2026 — The Internal Revenue Service is announcing the terms of a time-limited settlement opportunity for eligible taxpayers involved in conservation easement or historic preservation easement disputes with the IRS.

[Apply for a Low Income Taxpayer Clinic grant to serve taxpayers in your community](#)

IR-2026-64, May 6, 2026 — The Low Income Taxpayer Clinic Program today announced it will accept applications for LITC matching grants from all qualified organizations from May 6, 2026, to July 6, 2026.

[IRS updates conservation easement site; settlement opportunity details forthcoming](#)

IR-2026-63, May 6, 2026 — The Internal Revenue Service today announces updates to its Conservation Easement page, expanding information on abusive conservation easement transactions, recent court decisions, and warning signs for investors.

[IRS requests applications for 2027 IRSAC membership](#)

IR-2026-62, May 5, 2026 — The Internal Revenue Service is accepting applications for the Internal Revenue Service Advisory Council through June 5, 2026.

[IRS recognizes importance of small businesses, provides helpful resources](#)

IR-2026-61 May 5, 2026 — The Internal Revenue Service today announced a series of resources and events to support small businesses during National Small Business Week, which runs through May 9.

[IRS seeking applications for Tax Counseling for the Elderly and Volunteer Income Tax Assistance program grants](#)

IR-2026-60 May 1, 2026 — The Internal Revenue Service is now accepting applications for the Tax Counseling for the Elderly and Volunteer Income Tax Assistance grants.

[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 Excelebrate America.

THANK YOU TO THE 2025 SUMMER SYMPOSIUM SPONSORS AND EXHIBITORS

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BRONZE SPONSOR



BADGE SPONSOR



LUNCH & LEARN



AUDIT LOUNGE: AI AFTER DARK



EXHIBITOR RECEPTION (SPECIALTY DRINK)



CONFERENCE TOTE BAG INSERT



EXHIBITORS

