



California Society of Tax Consultants

CSTC Orange County Chapter Monthly Newsletter Summer 2019

President's Message

John Day, E.A.
O.C. Chapter President



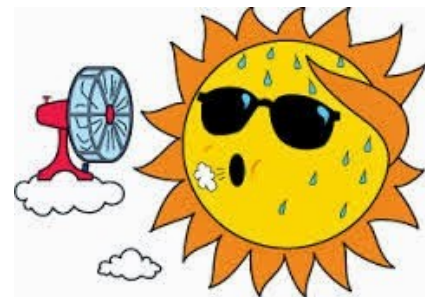
As your Chapter President, I'd like to take a moment to say a Thank You to our Orange County Chapter Members for their support this past 3 1/2 years. Chapter Elections are coming up and I wanted to encourage you to consider how you might also lend a hand to this great group. Whether that's being a Chapter Officer, Board Member, Short-term Committee Member or Meeting Night Helper. And of course the camaraderie of just YOU being here each month for our monthly meeting and training — I appreciate you all.

With all the changes our industry has endured this past 18 months, it looks like we still have more coming our way. The IRS has been issuing new Rev Procs, Regulations and now a new "less confusing" W-4 Calculator. California has also been no stranger with changes for us to stay on top of with New Conformity Bills, and the California Individual Health Care Mandate.

Now, more than ever, minimum standards really are a minimum. We, as Tax Professionals, need our CPE and networking ... see you at the meetings and remember to find some Summer Fun Time for yourself.

— John

For up-to-date information on continuing education, seminars, chapter meetings, this newsletter and more, please visit our website at www.cstcsociety.org



August Dinner Training Meeting Wednesday, August 14

Tax Exempt Organizations and the TCJA—Comparing Apples to Apples presented by David Eastis, CRTP



The goal of this presentation is to stimulate thought and discussion on how tax-exempt organizations have been affected by TCJA. The content of the presentation is threefold. First, we will look at issues of UBI for tax-exempt organizations. Second, we will touch on tips for deducting charitable contributions, and its effect on tax-exempt organizations. This section will also include grants and other types of monetary gifts to tax-exempt organizations. And finally, we will navigate briefly through Form 990, noting any new additions or questions, especially Schedule A. This presentation and materials are intended to provide attendees with useful ideas and resources that enable the Tax professional to analyze the effects of TCJA on tax-exempt organizations, and to navigate through various sections and parts of the Form 990.



**California Society
of Tax Consultants**

Society Membership Drive

CSTC is offering a \$25 Voucher towards your membership renewal for any member, in good standing, who brings in a new member — up to six referrals.

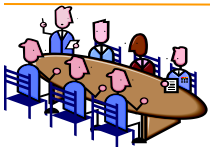
CSTC Mission Statement

CSTC advances professionalism within the tax industry by:

- Providing quality education
 - Creating Network opportunities
 - Advocating professional standards
- “Improving the tax industry, one professional at a time”

**** Mark your Calendar **
OC Chapter Training & Dinner Meetings**

- Aug 14 —TCJA and The Non-Profit
- Sept 11—Audit Correspondence & Representation
- Oct 9 — California Update—Lynn Freer
- Nov 13 — TBA, Gary Quackenbush
- Dec 11 — Holiday Party !!!
- Jan 10 — OC Chapter 8-hr Tax Update Form



2019 Board of Directors

President	John Day, EA	714-364-5173
Vice President	Patty Barron, EA	714-449-2099
Secretary	Deborah Jones, EA	714-524-7195
Treasurer	Michael Mergen, EA	714-924-3093
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Director	David Keil, EA	714-990-2711
Director	Rosemary Garrido, CRTP	714-974-7044
Director	Lisa Netherlain, CRTP	949-648-4204

Email Coordinator Cindy Conrad, EA



**CSTC
ORANGE COUNTY CHAPTER
Dinner Training**

**Coming in October
CA Update
2-hrs CA CPE**

**Featuring our own Chapter Member
and THE California Expert
Lynn Freer, EA**

**2019 CSTC Fall Tax
And Accounting Forum
“Nonprofits—
From Exemption to E-file”**

**Friday & Saturday,
Sept 20-21, 2019
Courtyard by Marriott
Sacramento**

**See the Society Website for full
details: cstcsociety.org**

CSTC Society Address

320 Pine Ave, Ste 1050
Long Beach, CA 90802
Tel 949-715-4192
Fax 949-715-6931



California Society
of Tax Consultants



Wednesday, August 14, 2019

REGISTRATION: 5:30 PM - MEETING STARTS 6:00PM

“Comparing Apples to Apples:
Tax Exempt Organizations and the TCJA”

**ORANGE COUNTY CHAPTER DINNER MEETING
PHOENIX CLUB - LORELEI DINING ROOM
1340 S. SANDERSON AVENUE, ANAHEIM CA 92806**

CPE: 2 Hours Fed Law,
IRS: 18QC1-T-01238-19-I, CTEC: 1000-CE-4620

Registration fees may be paid by check or cash—Sorry, we do not take Credit Cards

*** Please make your check payable to: CSTC**

\$40 CSTC members with advanced registration (Aug 9)

\$50 Non-members, Guests and Members at the door

Email your reservation to: lisanetherlain@yahoo.com

- Note: Even if you don't make the early registration cut-off, your reservation is appreciated so that we will have hand-out materials for everyone.

Includes 2 hours of CPE, Plus — buffet dinner; salad, 2 entrees, dessert & choice of water, coffee or iced tea.



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Presenter: David A. Eastis, CRTP

David is the owner of “Brea Tax Connections” a family tax and bookkeeping business in Brea, Orange County. He received his Accounting Degree in 2003 from Indiana University, South Bend, Indiana in 2003. David joined the California Society of Tax Consultants in 2004 and is currently serving as the Region Three Board of Director. He has served the CSTC as President of the Society Board for 2015-2016, a 4-year term as Secretary for the Society Board and as a prior Secretary for the Greater Long Beach Chapter. David also received his Bachelor of Arts Degree from the Universi-

Dinner “no-shows”

All no-shows of reservations will be billed back to you if not cancelled by the call-in date. Lisa will be keeping track if you make a reservation, and do not cancel your dinner reservation. The restaurant charges us for all meals whether you show up or not. Unforeseen circumstances are always taken into consideration on a case by case basis.



Look what's Coming Up Soon!

CSTC Orange County Chapter Announcements:

*I'm a thinker
and
a doer!*

September: Chapter Elections

Have you thought about being a O.C. Chapter Board Member?

We will be distributing ballots in September for the 2020 positions. Feel free to reach out to one of our current board members with any questions or to be placed on the ballot. We also have opportunities to help during the meetings, serve on a brief committee or lend a hand at an event — Just reach out to one of the officers and we may just be reaching out to you.

September 11: Chapter Dinner Training

Anthony Bustos, EA—Audit Representation & Correspondence

Points include: Initial contact with the Auditor; Preparation of Documents & Narratives; Service Selection Center of the case; Office vs Field; Service Center Correspondence Audits; IRS auditing requirements; Preparing for Appeals; Notice of Deficiency; preparing for appeals and Case Closure.

* Watch your email for CPE Registration announcement.

September 15: Due Date Extended Returns Partnerships, S-Corps

September 30: Due Date Extended Returns for Forms 1041, etc.

September 20-21 : CSTC Fall Tax and Accounting Forum Sacramento

Non-Profits from Exemption to E-file. Details on the CSTC Society Webpage: www.cstcsociety.org

October 9: California 2 hour Update with Lynn Freer

October 15: Due Date Extended Returns 1040, FinCEN 114, 1120

October 31: Halloween and CTEC Registration Deadline

November 13: Chapter Dinner Training with Gary Quackenbush

** Come hear from our Society President! Topic to be announced.

November 15: Due Date Extended Returns 990 Series

December 11: Merry Christmas! OC Chapter Christmas Party

Happy Birthday

July

Kenneth Clark
Charles Wagner

August

John Keil
Ray Mew
Stella Marten

September

Michael Daranay
Luis Marten
Payton Reid

Members' Corner



FALL CLEAN-OUT !

Are you like me and have a dusty collection of clips and pens and calculators and stackers and tape dispensers — and, well — JUST STUFF ???

Bring those items to the September 11 Meeting.

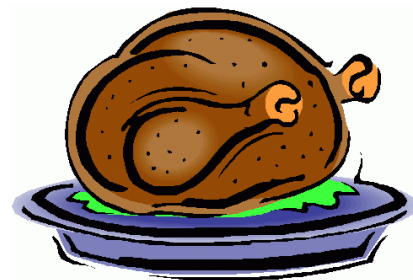
Must be:

- small enough for my table
- useful to another professional, no antiquated junk, please.
- Not for sale—it's a grab & go table.

Note: anything not grabbed or taken back will be donated !

Winner, Winner CPE Dinner !!!

Want to earn some Free Education?
Wear Your Name Badge!!



Each O.C. Chapter meeting we have a drawing for a CPE certificate —but you can only win if you are wearing your CSTC name badge !!

(\$10 off Chapter Dinner or \$ 20 off the January Update)



**The Phoenix Club...
1340 S Sanderson Ave, Anaheim, CA 92806**

Directions...

Conveniently located off the 57 & 5 Freeways

5 Southbound exit Ball Road and follow Ball Road east to Phoenix Club Drive, follow the directions below or...

5 Southbound & Northbound exit to 57 Freeway Northbound then follow directions once on 57 Freeway. Northbound

57 Freeway Northbound exit Ball Road, turn right onto Ball Road and drive east to the first signal, which is Phoenix Club Drive then...

57 Freeway Southbound exit Ball Road, turn left onto Ball Road and drive east to the first signal, which is Phoenix Club Drive then...

Turn right onto Phoenix Club Drive. Drive past the auto dealers to the second street on the right, Sanderson Avenue. Turn right onto Sanderson Ave, The Phoenix Club is at the end of the street on the left side.



Directions to the Phoenix Club.

