



Volume - 2018
Issue - August
Editor - Jen Horton

MISSION STATEMENT

CSTC advances professionalism within the tax industry by:

- Providing quality education
- Creating networking opportunities
- Advocating professional standards

GLB 2017 Chapter Meetings Held At:
Grand Events Center
4101 E. Willow Street
Long Beach CA 90815

Morning Educational Event / January-April
Cost: Price includes buffet breakfast 8:30AM
\$35.00 Members with RSVP
\$40.00 Members no RSVP
\$45.00 Guests

Meeting: 8:30 to 12:00 Noon
January thru April
1hr Fed Tax/1hr Fed Update / 1hr CA

Evening Educational Event / April - November
Cost: Price includes buffet dinner 6:30PM
\$35.00 Members with RSVP
\$40.00 Members no RSVP
\$45.00 Guests

Meeting: 6:00 to 9:00 PM.
May thru November 2HRs CE

Board Meeting: 4:00 to 5:45 P.M.
May thru December

*For reservations to an educational event, or to be added to our Permanent Meeting List, contact us:
Dennis Kaho @ 562/421-8523
No eMail reservations accepted*

Cancellation Policy: If you have reserved for a Chapter meeting and do not call to cancel at least 7 days prior to the meeting, you will be billed for the price of that meeting as GLB will have already reserved your food and will be required to pay for it. This also includes GLB members on the permanent lists.

NO SHOW POLICY: No Refund

SOCIETY CORPORATE OFFICE

California Society of Tax Consultants
Long Beach, California
Phone: 714/750-2782 **Fax:** 714/750-2722
Phone: 949/715-4192 **Fax:** 949/715-6931
WWW.CSTCSOCIETY.ORG



APPROVED CONTINUING EDUCATION PROVIDER

August 29, 2018

Gary Quackenbush, Esq
Presenting
Ethics

2 CE Hours Ethics
IRS: 18QC1-E-01036-18-I
CTEC: 1000-CE-4407

We all know the drill, we attend 2 hours of Ethics each year... OR MORE! Our speaker this month will present ethics in a...
Cont. on page 5

Meal: Asian Salmon, salad, vegetable, rolls & dessert

SPEAKER BIOGRAPHY: Gary Quackenbush is a San Diego attorney, member of the California and Colorado State Bar Associations and is...
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APPROVED CONTINUING EDUCATION PROVIDER

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GLB Summer Tax Seminar Registration Form

DISCLOSURES

CSTC presentations are designed to meet requirements of the Director of the Internal Revenue Service; California State Board of Accountancy; the International Board of Standards and the California Tax Education Council, including Code 31 of Federal Regulations 10.6(g), continuing rule 88(c) covering maintenance of attendance records, retention of program outlines, qualifications of instructor & length of class hours. This does not constitute an endorsement by these groups.

CSTC has been approved by the California Tax Education Council to offer continuing education courses that count as credit towards the annual "continuing education" requirement imposed by the State of California for CTEC Registered Tax Preparers.

A listing of additional requirements to register as a tax preparer may be obtained by contacting CTEC at P.O. Box 2890, Sacramento, CA, 95812-2890, toll-free by phone at (877) 850-2832, or on the Internet at www.ctec.org.

It is imperative that we get accurate head counts for attendance at our Chapter events; please make timely reservations for each event you will attend. Mark your calendars now for these 2018 dates, AND please note to call in your reservation 10 days ahead of each event

2018 Prospective Event Calendar

Roundtable Events

Our Roundtable Events were a huge success! Thank you to all who attended and participated! We couldn't do it without you!

Evening Educational Events

Our Evening Educational Events include a buffet dinner meal which begins at 6:00PM. Dinner includes coffee, iced tea, not tea, and iced water. Save these dates !

- | | |
|-------|--|
| 09/26 | Speaker: Lynn Freer, EA
Topic: California Update
Beef Stroganoff, salad, vegetable, rolls & dessert |
| 10/24 | Speaker: Ken Zitken
Topic: 1031 Exchanges
Chicken, salad, vegetable, rolls
46 th Anniversary – Celebration with cake |
| 11/28 | Speaker: Shannon Hall
Topic: Shannon's Hall of Tax Curiosities
Plated Meal
Baked Ham, salad, vegetable, rolls & dessert |
| 12/19 | Holiday Celebration – No CE
Installation of Officer
White Elephant Gift Exchange
Plated Meal
Roasted Turkey, salad, vegetable, rolls & dessert |

EA Education Requirement: 72 hours education per enrollment period (3 years) which consist of a minimum of 16 hours education annually and a minimum of 2 hours ethics courses annually.

CRTP Education Requirement: 20 hours education annually which consist of 15 hours IRS approved education (10 hours federal tax law, 3 hours federal tax law update, 2 hours ethics) AND an additional 5 hours California tax law.

AFSP Education Requirement: 18 Hours education annually which consists of a 6 Hour Annual Federal Tax Refresher (AFTR) Course & Test, 10 Hours Federal Tax Law and 2 Hours Ethics. Preparers currently registered with CTEC (California), OBTP (Oregon) and MSBITP (Maryland) are exempt from the AFSP requirements

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SPEAKER BIOGRAPHY CONTINUED... the President of the [California Society of Tax Consultants](#), San Diego Chapter. He is admitted to practice in all courts in the State of California, Federal District Court for the Southern and Central Districts of California, all courts in the State of Colorado, Federal District Court for the District of Colorado, and the United States Tax Court.

Gary is the host of his own podcast radio show "GQ on the Law" available on iTunes, Podbean, and Stitcher Radio. He is a weekly guest on the "Word on Wealth" radio program with [Marty Schneider](#) on KCBQ 1170 AM & www.KCBQ.com – 2pm Tuesdays and KPRZ 1210 AM & www.KPRZ.com – 5pm Tuesdays.

He has been invited to speak at engagements for accountants, attorneys, tax professionals, financial planners, and civic and church groups.

Gary received his B.S. from Brigham Young University in 1984 and his J.D. from California Western School of Law in 1988. Gary and his wife Cheryl's growing family consists of four children, their spouses, and ten grandchildren into the family. Outside of the office you will find Gary spending time with his family, water skiing, boating, rock climbing, mountain biking, and camping.

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GLB SUMMER TAX SEMINAR IS MONDAY, AUGUST 27TH !

REGISTER BEFORE AUGUST 15 FOR THE
BEST PRICE !

Registration form on the last page of
this publication

President's Message



Since we have not had a recent newsletter, partly my fault, some of this information you already know, but others do not, so there may be some repetition. I start out my column with very sad news for those

that have not already received notices about the losses we have recently suffered during tax season and just beyond.

On April 15th, we lost member **Syed Shuji** to a heart attack. Sadly and heart breaking to all of us, we also lost long term member and Past President of GLB who was very instrumental in helping us keep GLB moving forward and my right hand man, **John Jack Murrill**. On Saturday, May 5th, Jack was working in his office to catch up on tax returns when he was feeling stress in his chest. It was after hours at the office building when he called 911. The Fire Department was able to get into the building thru their emergency access, but not into Jack's office. He had locked himself in as he usually did as he was alone in the office so the Fire Department had to break down the door. From what I have been told, It appears that it was too late to save him. I also want to give my extreme and heartfelt "Thank You's" to **Paul Payne and his wife Nicole**, for opening up their home to us for a food filled evening that allowed us to be together with Jack's wonderful family. So, thank you so much Paul & Nicole for your generosity in providing us to a place to gather to have additional time to be together and share our stories about our friend and colleague.

I have also just been informed that long time member **Martha Gilmore** just passed away the other day. I have been told there will not be any services for her. I just talked to David Eastis to get an update on his mother and long time GLB member **Betty Eastis** regarding her battle with cancer. While there is no change in her prognosis, David happily relayed that Betty has stabilized, which is good news. We send our thoughts & prayers to the families of those we have lost and those in need.

The Summer Symposium has now passed and we have many chapter members who attended that will qualify for either the \$100 or the \$50 rebates that will be distributed and/or mailed at our next chapter meeting or as soon as I receive new checks from the bank. Unfortunately, we have to wait for the bank to get them to me and they seem to be really slow in getting them to me so I can issue the rebates. You will get them sometime this month.

GLB members worked very hard to help with this Society event as I was very short handed this time and you all helped in making this event a success. I want to thank my "Volunteers" for all their hard work and efforts. The following have my heartfelt "thank you's" for their time – Diane Kucera, Steve Bruce, Tom Cuomo, Shannon Hall, Jim Hicklin, Dennis Kaho, and Fran Oatridge – YOU ARE THE BEST!!! We had 22 members attending this year!!

Our Summer Tax Workshop is on Monday, August 27th at the Grand Events Center. Our Speaker this year will be George Van Buren and the topic is "Tax Potpourri". More information will be following as well on the content of this

workshop and what the CE hours will be. Sign up early for the best pricing

Respectfully Submitted,
Nikki LeBrun, EA, GLB President

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INLAND EMPIRE:

3rd Wednesday of the month. For information and reservations, leave message 909/575-1066 with your request. Meeting held at DoubleTree Hotel Claremont, 555 W. Foothill., Claremont 6:00 P.M.

LOS ANGELES:

1st Tuesday of the month. Call Johnny Diaz, Jr. for information and reservations @ 562/692-0983. Meeting held at Taix French Restaurant at 1911 Sunset Blvd. in Los Angeles 7:00 P.M.

ORANGE COUNTY:

2nd Wednesday of the month. for information and reservations contact via eMail: Debbie Daniels @ Debbie.daniels.cstc.oc@gmail.com . Meetings held at The Phoenix Club, 1340 S Sanderson Avenue in Anaheim 6:00 P.M.

SAN GABRIEL VALLEY:

1st Thursday of the month. Call Carmen Hustad for information and reservations @ 909/896-6521. Meetings held at Marie Callender's, 1560 Albatross Road in the Puente Hills East Mall 6:00 P.M.

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MENTORING FOR NEW CHAPTER MEMBERS

Are you new to the tax preparation arena?
Or a new member to The Greater Long Beach Chapter?

We are here to help you with business practice and tax return preparation issues. Knowing who to call and ask for help is part of our chapter "mission". Please contact Dennis Kaho at: 562 421-8523 and I will do my best to get you connected with chapter members for help or guidance.

Respectfully,
Dennis Kaho, Director / Mentor Coordinator

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June Birthday Wishes go out to:

- Steve Bruce**
- Terri McCone Williams**
- Sherrill Overfield**
- Baljinder Rakkar**
- Thelma Ryder**

July Birthday Wishes go out to:

- Nikki LeBrun**
- Elvia Chavez**
- Frank Farfan**
- Martha Gilmore**

August Birthday Wishes go out to:

- Petra Castillo**
- James Hicklin**
- Thomas Jenkins**
- Helen Vargas**

If you haven't already done so, please contact Shannon Hall-sintax1099@gmail.com - to add your name to our Birthday list!

Thank you one and all for your continued membership!

If we failed to include you on our birthday we humbly apologize and ask that you let us know, so that we can make sure not to miss you again!

Respectfully submitted,
Shannon Hall, 2nd VP Membership

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Address Change???

**Have you moved?
Changed your eMail address?**

P-L-E-A-S-E – login to your member account at cstcsociety.org and update your contact information!!! We don't



want you to miss out on any announcements from CSTC!!!!

The members of your Chapter Board have all been trained on how to keep your contact information up-to-date through the Society website. If you are uncertain how to log in, please speak with any Board member at the next Chapter event.

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Notes from the Editor

NEWSLETTER INFORMATION

I've no doubt the vast majority of our readers have noticed there's been no mailing of our newsletter for the past couple of months. Please bear with us while we work on a remedy to get the newsletter out to our membership in the same – pdf – format which we've always provided.

Society has moved to a more "digital" format for Chapter newsletters. While we 'could' provide that format for our members, we know that the majority of you would prefer the newsletter old school – in pdf format. Sounds easy... not so. We no longer have access to our Chapter Member list – which means we have no way to gather an updated eMail list with ALL members on it, and the list I have is quite old.

So, while we're working on the issue please be patient! You may receive a new "digital" format newsletter – just so we can get something to you while we work out these challenges.

FREE TAX RESOURCE BOOK – a perk for GLB members

Beginning next month we'll have our countdown for earning a free tax resource book up to an approximate \$45 in value! Keep an eye out for your name, and thank you for supporting GLB educational events!

A CALL FOR VOLUNTEERS

As you're all, no doubt, aware – GLB doesn't currently have a "formal" treasurer. Donna resigned the position when she moved to Las Vegas. Jack offered to take over her work until the next election, and with his passing the job has now befallen Nikki. Nikki will handle the treasurer duties until the 2018 election.

*CSTC is a volunteer organization, and we depend upon our members to step up and help out wherever and whenever they can. Nikki has been on the Chapter board – well, as long as I've been a member! **Kudos Nikki for the great job you do!** That being said – everyone needs a break. Please consider helping Nikki realize her goal of taking a break from the GLB Chapter board.*

Please consider running for a position on the GLB Chapter board when elections come round this fall.

Don't feel like you need to take on the hardest or most time consuming job right away; in fact, we prefer you start out gently and work your way up. Yes, the treasurer job is open and for an accountant – well, really ... that job is entry level, isn't it? But:

Perhaps you might like to work with new members as the mentoring chair.

Perhaps you might like to assemble the newsletter and send it out each month.

Perhaps you'd just like to be a part of your Chapter Board and would be willing to join as a Director and we'll work with you to find something you like to do.

Please consider giving back to your Chapter and to your peers.

The Board needs fresh ideas, and we know that Y-O-U could provide us with those fresh-to-death ideas!

So think about it. Talk to current Chapter board members. Find out what it is they do and think about what you might be able to bring to the table.

When you get the call this fall asking if you'd like to run for a position on the GLB Chapter board – please don't maintain the status quo by saying no... change it up for 2019 and say Y-E-S!!!

Thanks for reading, and I sure hope you'll volunteer a few extra hours a year to keep GLB on top of its game!

Respectfully submitted,
Jen Horton, GLB Editor



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Course Description, Continued from front page...

...a most fun and entertaining way! We run into ethical situations with most every client: Decisions; Decisions:

- ✓ What does the IRS *want us to do*
- ✓ What does the Internal Revenue Code *tell us we can do*
- ✓ What did the clients' hairdresser tell them *they should do*

We've all been there – you're not alone. Come this month and find out how to navigate ethically preparing a tax return.

Ethics are the standards by which actions are judged. For tax practices, ethics are not only judged by a person's clients but they are determined, monitored and enforced by a taxation agency. The department of the treasury sets forth in TD Circular 230 the standards for ethics for tax professionals. Students will learn about the department of treasury's standards of honesty, competence, integrity, confidentiality, responsibility, legality and transparency with which they should run their tax preparation services.

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Society News

*"Improving the tax industry...
One professional at a time."*

Support Society & Chapter Education Programs!!!

9/10/18 – Society BOD meeting
9/21-9/22/18 – Wine Country Seminar
11/5/18 – Society BOD meeting

Society News

There are still changes going on with Management Company. The Executive Director, Michele Hyson who was previously working with us has been replaced by Jenn Baker. If you need to contact her at their office, her phone number is 949-715-4192 and her email address is Jenn.Baker@cstcsociety.org.

While we were attending the Summer Symposium, the Management Company was sold and there is a new company now in charge. However, Jenn & Morgan will now be working with the new company, so we retain them as our Executive Directors. The phone numbers and email addresses remain the same, but the mailing address is supposed to change, but we haven't received that information as yet.

Since the Society BOD has cancelled the annual Tax Bridge, Chapters will be able to provide their own Annual Tax Update programs in lieu of the Tax Bridge.

The Wine Country Symposium will be focused on Partnerships & LLC's this year. Our own Shannon Hall is the Chair of that program. This event will be held at the Grand Events Center where we have our Chapter meetings.

It was determined that the CSTC Annual Meeting that has been held in the past at the Tax Bridge will be changed to have that at the Annual Summer Symposium starting in 2019 after our Bylaws are changed to have it at that time as several things will need to be changed including going from a calendar year for elections to a fiscal time period to coincide with the annual meeting.

Don't forget the new incentive to bring in new members to CSTC. ***For every new person you bring in, you will receive \$25 off of your membership dues for the next year.*** Bring in 6 new members and your membership is paid!! There is no carryforward on this and we are limited to "6" \$25 credits towards our dues per year. This is a win-win for everyone involved.

Check the CSTC calendar for chapter programs and other workshops that may be of benefit to your tax practice. Watch for the start of the webinars!!

*Respectfully Submitted,
Nikki LeBrun, EA – GLB President*

Greater Long Beach Chapter – Officers, Directors & Volunteers

Officers

President	Nikki LeBrun	310/534-3492	nlebrun@sbcglobal.net
1 st VP Education	Frank Farfan	562/865-8868	farfan@earthlink.net
2 nd VP Membership	Shannon Hall	562/715-4495	sintax1099@gmail.com
Secretary	Shobha Bajaj	562/441-6724	bajas01@yahoo.com
Treasurer	Nikki LeBrun	310/534-3492	nlebrun@sbcglobal.net
Past President	Harold LeMaster	714/332-3508	hal.lemastereal@gmail.com

Directors

Editor	Jen Horton	310/415-1685	cstcglb@gmail.com
Phone Tree/Resource Bks	Fran Oatridge	310/530-6499	franoatridge@hotmail.com
Mentoring	Dennis Kaho	562/421-8523	dkaho@aol.com
Reservations	Dennis Kaho	562/421-8523	<u>DO NOT EMAIL FOR A RESERVATION</u>
CE Evals & Certs	Jim Hicklin	562/806-4557	jimtheman390@yahoo.com
AudioVisual	Frank Farfan	562/865-8868	farfan@earthlink.net
Communications	Nancy Spiegel	714/527-3065	nspiegel@pacbell.net
Technology Liaison	Jen Horton	310/415-1685	network@jenhorton.com
Government Affairs	Cameron Hernandez	562/270-5586	cameron@tritonbusinessconsulting.com

Roundtable Research

Federal Application	Harold LeMaster	714/332-3508	hal.lemastereal@gmail.com
California Conformity	Dennis Kaho	562/421-8523	dkaho@aol.com

Volunteers

Birthdays/Anniversaries	Shannon Hall	562/715-4495	sintax1099@gmail.com
Nominations Chair	Stephen Bruce	541/507-1789	brucetax@gmail.com
Volunteer at Large	Diane Kucera	623/266-3332	taxbus@dianekucera.com
CSTC Chapter eMail			cstcglb@gmail.com

CSTC GLB Members Also Receive...

Discounted Pricing

On select educational events and tax resource books purchased through the chapter

Attend 9 GLB educational events

between October 2017 to September 2018 and receive a select "Free" resource book discount valued at approximately \$50. **Must be a member-in-good standing throughout October 2017 to September 2018**

CSTC Logo

It is okay to use the CSTC logo on your letterhead, but you must always add "Member of ..." or "Member since ..." or "Member in good standing..." when using the CSTC logo.

Classified Ads**So-Cal Quality Appraisals:**

Steven A. Hassoldt, Certified Residential Appraiser

Telephone: 310/371-5978

Email: socalquality@gmail.com

Fiduciary Income and Estate Tax Specialist: Over 30 years specialized experience in fiduciary taxation. Referral Fee(s) - the greater of: 25% of the tax prep fee, or \$750 – will be paid to any CSTC member who refers a *paying client* filing Form 706. Referral Fee(s) available with respect to Forms 1041, 5227, and/or 709. Related services include Trust and Estate Administration consultation.

Contact Hal LeMaster EA, Masters in Taxation:hal.lemastereal@gmail.com or 714/332-3508.**Keep the GLB Chronicle Coming to Your inBox!**

CSTC GLB strives to promote professionalism by providing quality educational events for tax professionals, and this is done completely by volunteers.

We are actively seeking a newsletter editor. If you enjoy our monthly newsletter, please consider joining our team, drop us a note at cstcglb@gmail.com

The Editor position is an entry level position and should only take you a few hours a month to compile. Article writing is not a requirement. Don't let our newsletter go by the wayside; volunteer today!

ADVERTISE FREE WITH GLB!!!

Place an ad in the CSTC GLB Chronicle. It's a great way to get your message out to a targeted audience that will best meet your needs!

eMail your request to the editor at: cstcglb@gmail.com.

This service is free to all CSTC members

If you know of a business or someone that could benefit by placing an ad in our newsletter, please have them contact Nikki LeBrun, 310/534-3492. Non-CSTC members may place ads for a monthly fee of \$10.00.

eMail is our main source of contact with our members. When you receive an eMail from us –P-L-E-A-S-E open it and check our message.

**eMail Delivery & Your Chapter**

Certain CSTC members are not receiving eMails from our Chapter, sometimes not from Society. **This is an AOL issue, and YOU must take action to resolve it!**

There are two fixes for this issue:

- 1) Log into your account on cstcsociety.org and make certain you have NOT opted out of receiving eMails from us/Society AND make sure we have the correct eMail.
- 2) Add our eMails to your eMail white list and give permission to your eMail provider to accept eMails from us.
 - a. eMail from Society will come from:
 - i. cstcsociety@sbcglobal.net
 - ii. info@cstcsociety.org
 - b. eMail from the Chapter will come from:
 - i. cstcglb@gmail.com; or
 - ii. GLBevents@jenhorton.com

Don't miss out on our newsletter and other important eMails from CSTC!

Come to your local chapter meetings and get answers to your tax questions from professionals, peers and friends.

***Don't Let This Happen!
CSTC is here for YOU!***



GREATER LONG BEACH CHAPTER OF CSTC

Proudly Presents their Annual 2018 SUMMER TAX WORKSHOP

GEORGE VAN BUREN, EA, MBA

AUGUST 27, 2018

GRAND EVENTS CENTER in LONG BEACH

4101 East Willow, Long Beach, CA 90808



Breakfast and Lunch Buffets & Breaks are included in your price. Receive Continuing Education Credits of:
5 hrs Federal Tax Law IRS CE# 18QC1-T01035-18-1
2 hrs Federal Tax Update IRS CE# 18QC1-U01034-18-1 and
1 hr of California CE CTEC # 1000-CE4406



7:00 AM Registration & Breakfast
8:00 AM Tax Potpourri Topics
9:40 AM Break
10:00 AM Continues
11:40 AM Lunch
12:30 PM Continues
2:10 PM Break
2:30 PM Continues
4:15 PM Adjourn

Please make your check payable to "CSTC". Mail the Registration form with your payment to:
Nicole LeBrun, 1005 Park Circle Drive, Torrance, CA 90502-2817
If you have any questions, call 310-534-3492 or email nlebrun@sbcglobal.net

FEES – All Day (8 Hrs CE)	<u>By Aug 15</u>	<u>After Aug 15 & At the Door</u>
Members	\$175	\$225
Staff	\$185	\$235
Non-members	\$200	\$250

Fees include: Educational materials for all sessions, breakfast buffet, lunch buffet and refreshment breaks. Refund policy: Fee less \$50 for costs and handling will be made only if requested before August 15, 2018. No show: No refund.

This presentation has been designed to meet requirements of the Director of the Internal Revenue Service; California State Board of Accountancy; the International Board of Standards and the California Tax Education Council including Code 31 of Federal Regulations 10.6(g), continuing rule 88(c) covering maintenance of attendance records, retention of program outlines, qualifications of instructor & length of class hours. This does not constitute an endorsement by these groups.

PLEASE PRINT REGISTRATION INFORMATION CLEARLY

NAME _____ PHONE _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

EMAIL ADDRESS _____

CPA, EA, CTEC# _____ PTIN# _____

MEMBER OF CHAPTER _____ STAFF OF MEMBER OF CSTC _____