



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

California Society of Tax Consultants

Phone: 949/715-4192

Fax: 949/715-6931

WWW.CSTCSOCIETY.ORG



APPROVED
CONTINUING
EDUCATION
PROVIDER

September 26, 2018



**Lynn Freer, EA
President, Spidell
Publishing, Inc.**

Presenting

California Update

2 California CE Hours

IRS: 18QC1-E-#####-18-I

CTEC: 1000-CE-####

Our September event will be a California update, presented by one of our favorite Speakers, Lynn Freer, EA, President of Spidell Publishing, Inc....

Cont. on page 2

Meal: Beef Stroganoff, salad, vegetable, rolls & dessert

SPEAKER BIOGRAPHY: Lynn "Ms. California Tax" Freer is President of Spidell Publishing, Inc.® She works closely with ...

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APPROVED
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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 !

- | | |
|-------|--|
| 10/24 | Speaker: Ken Zitken
Topic: Property Tax Considerations...
Chicken, salad, vegetable, rolls
46 th Anniversary – Celebration with cake |
| 11/28 | Speaker: Shannon Hall
Topic: Dependency Detectives
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... all state tax agencies and is often consulted for input on policy decisions. She always has the inside information on what's happening at the state level because she devotes herself full time to analyzing, writing about, and teaching California tax law and procedures. Lynn speaks at Spidell's annual Federal and California Tax Update Seminars, as well as many other seminars and webinars.

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Course Description, Continued from front page...

Lynn will provide us with updates on what is currently happening in the realm of California taxation and the Franchise Tax Board, and discuss some of the more prevalent differences between Federal and California tax laws.

Lynn is always a delight to hear speak, and we encourage everyone to join us for an evening of F-U-N and Knowledge!

Our California update will provide 2 Hours of CTEC recognized California Continuing Education; at this time, there is no IRS credit for California CE. CPA's and Attorney's should check for applicable CE credit for those designations.

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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

* * * * *

September Birthday Wishes go out to:

Inge Boekenhauer
Betty Eastis
Fran Oatridge
Paul Payne
Cameron Hernandez

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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Notes from the Editor**NEWSLETTER INFORMATION**

I've no doubt the vast majority of our readers have noticed there's been mishaps in mailing of our newsletter for the past few 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 given us a new option for sending out a link to a pdf newsletter, and we're utilizing that option where available. We're also considering new ideas to help maintain a "library" of newsletters in the cloud for both our membership and tax pros everywhere.

So, while we're working on the issue please be patient! You may receive a link from Society within each event announcement/eMail allowing you to pull down our newsletter from their cloud files.

FREE TAX RESOURCE BOOK – a perk for GLB members

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

A CALL FOR VOLUNTEERS – repeat... P-L-E-A-S-E read!

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. We have a prospective nominee for that election, but it means another position on our Board will be opening up.

*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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Society News

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

Support Society & Chapter Education Programs!!!

9/21-9/22/18 – Wine Country Seminar

11/5/18 – Society BOD meeting



Have you moved or changed your telephone number?

Make sure you give your new contact information to CSTC so you won't miss correspondence from us!

You can even change it online; just log in through the Member Center at

www.cstcsociety.org

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 AdsSo-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!

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.

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.

Advertising 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. info@cstcsociety.org
 - b. eMail from the Chapter will come from:
 - i. cstcglb@gmail.com; or

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!

