



Volume - 2019  
 Issue - May  
 Editor - Jen Horton

Phone: 949/715-4192  
 Fax: 949/715-6931  
[WWW.CSTCSOCIETY.ORG](http://WWW.CSTCSOCIETY.ORG)

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 CONTINUING  
 EDUCATION  
 PROVIDER

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**MISSION STATEMENT**

CSTC advances professionalism within the tax industry by:
 

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

**Roundtable Event / January-April**

**Cost:** includes buffet breakfast 8:30AM  
 \$40.00 Members with RSVP  
 \$50.00 Guests & Members no RSVP  
**Meeting: 9:00AM to Noon**  
 1hr Fed Tax/1hr Fed Update / 1hr CA

**New for 2019!!! Extended educational offerings in June, July, September and October**

*Students may choose to attend the 4-Hour Extension session only, the 2-Hour Evening session only, or both sessions – low, low pricing for 2019!*

**Extension (Afternoon Only)**

Only offered June, July, September, October  
**Cost:** includes snack break mid-event  
 \$60.00 Members with RSVP  
 \$80.00 Guests & Members no RSVP  
**Meeting: 2:00PM to 6:00PM**  
 4HRs CE (type TBD)

**Extension (Afternoon & Evening)**

Only offered June, July, September, October  
**Cost:** includes snack, & dinner buffet 6:30PM  
 \$100.00 Members with RSVP  
 \$130.00 Guests & Members no RSVP  
**Meeting: 2:00PM to 9:00PM**  
 4HRs CE (type TBD)

**Evening Educational Event / May – November**

**Cost:** includes buffet dinner 6:30PM  
 \$40.00 Members with RSVP  
 \$50.00 Guests  
**Meeting: 6:00 to 9:00 PM.**  
 2HRs CE (type TBD)

**Board Meeting: 4:00 to 5:45 P.M.**

May thru December

**GLB 2019 Chapter Meetings Held At:**

**Grand Events Center  
 4101 E. Willow Street  
 Long Beach CA 90815**

**May 29, 2019  
 Shannon Hall**

presents

**Ethics in Practice**



**Our meal for May will be a Chicken buffet**

**Speaker Bio:**

Shannon Hall spent three years studying classical theatre at an acting conservatory, so it was only a matter of time before...

continued on Page 3

**Session Summary:**

It's that time again, time to get....

continued on Page 3

*For reservations to an educational event, or to be added to our Permanent Meeting List, contact:  
**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**

[2019 Event Calendar](#)

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### Roundtable Events

**THANK YOU to all who participated with problem resolutions discussed at this year's Roundtable events! It's because of your continued support that GLB is able to succeed with our tax season events!**

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### Evening Educational Events

Our Extension Sessions include a snack at the mid-point, but *does not include a full meal.*

Our Evening Educational Events include a buffet dinner meal – complete with coffee, iced/or/hot tea, salad, vegetable, rolls & dessert.

**Extension Sessions begin at 2:00PM**

**Dinner is served at 6:00PM**

**Evening Sessions begin at 7:00PM**

- 6/26 Afternoon Extension Session  
Speaker: Eugene Ostermiller  
Topic: California Differences
- Evening Session  
Speaker: Eugene Ostermiller  
Topic: California Differences – How it fits on return  
Beef Brisket
- 7/31 Afternoon Extension Session  
Speaker: Ruth Godfrey  
Topic: Like Kind Exchanges
- Evening Session Speaker: Ruth Godfrey  
Topic: Like Kind Exchanges – How it fits on return  
Chicken buffet
- 8/28 Evening Session  
Speaker: Lynn Freer  
Topic: California Update  
Asian Salmon buffet
- 9/25 Afternoon Extension Session  
Speaker: Frank Acuna  
Topic: Trusts & Estates
- Evening Session Speaker: Frank Acuna  
Topic: Trusts & Estates – How it fits on return  
Beef Stroganoff buffet
- 10/23 Afternoon Extension Session

Speaker: George Van Buren  
Topic: Sec. 199A Deduction

Evening Session Speaker: George VanBuren  
Topic: Sec. 199A Deduction – How it fits on return  
47<sup>th</sup> Anniversary – Celebration with cake  
Chicken buffet

11/20 Speaker: Shannon Hall  
Topic: Dependency Detectives  
Baked Ham plated meal

12/18 Holiday Celebration  
White Elephant Gift Exchange  
Roast Turkey plated meal

\* \* \* \* \*

### Summer Tax Workshop

Our Summer Tax Workshop is traditionally an event to remember! This workshop includes a buffet breakfast and a buffet lunch.

We're excited to bring you one of CSTC's favorite Symposium speakers to this 8-hour day of learning and camaraderie.

**L.G. Brooks**

*presents*

**“All Things Taxation & Representation”  
August 19, 2019**

*SAVE THE DATE! Details and Pricing coming soon!*

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**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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May Birthdays

**WAIT! No Birthdays during May???**

*If you're birthday falls during May, you need to let us know right away so we can add you to our Birthday List!!!*

If you haven't already done so, please contact Shannon Hall-[sintax1099@gmail.com](mailto: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, 2<sup>nd</sup> VP Membership*

\* \* \* \* \*

May Anniversaries

- Stephen Bruce 22 YEARS
- James Hicklin 20 YEARS
- Rumalda Medina 19 YEARS

My how time flies!!!

- Joan Whittaker 14 years
- Inge Boekenhauer 12 years
- Joann Miyamoto 6 years
- Lou Cannon 4 years
- Guillermo Flores 3 years
- Tamaki Okamoto 2 years

Thank you for your continued membership! Members like you are who made CSTC the organization it is today!

*If we've missed your name, we're sorry – please let us know so we may add you to our list!*

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**Speaker Bio**

continued from front page

...she got into the tax business. She has been a member of CSTC since she began preparing taxes all the way back in 2012, though her tax career truly began many years before when, as a child, she would play with the tax forms in the library. After a few years working as an office manager for a fairly well known CSTC member (who happened to be her Godfather) she decided it was time to join the "family business" and jumped in. Shannon has worked in such well-respected places as her kitchen table and H&R Block, where she worked as an office manager and instructor before joining some laid-back CPAs in Signal Hill, California. Shannon is a proud, newly minted Enrolled Agent. More than anything, Shannon hopes to make tax education engaging and fun and strives to make taxes less taxing.

**Session Summary**

continued from front page

... your annual 2 hours of ethics...because you have to!

- Why do the entities that govern tax preparers care so much about ethics?
- What does it actually mean to be "ethical?"

We'll take the discussion from the theoretical into the practical by exploring what it means to have professional ethics, and examining situations where ethical practices can save your, um, assets.

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*A very special message from Shannon Hall – 1<sup>st</sup> VP/Education for GLB, and this month's distinguished Speaker !*

**"CSTC and Me"**

We all know this organization is a great source for continuing education, as well as just about the best network of knowledgeable and helpful tax pros one could ask for. I've lost count of the number of times a fellow CSTC member has helped me out of a tax jam.

To me, though, this group has been so much more than simply a place to get my CE hours and a directory of people to call for help; I have found friends and mentors, and, thanks to the support of my CSTC family, I have found myself falling into the most amazing opportunities to develop and grow.

When I decided that I wanted to try my hand at educational speaking, no one was more excited or supportive than our own fearless leader, Nikki. With her guidance and assistance, I struggled my way through my first dinner meeting (if you were there you may remember my 20-minute

presentation that had to stretch to 2 hours, and if you weren't there, I was amazing and had no problems).

It wasn't long before I was jetting all over California to speak to other chapters and then, shockingly, I found myself sitting in the Spidell offices leading my first webinar! (It also went off without a hitch and I definitely did not finish too quickly again!)

**This June I am beyond excited to make my Nevada debut as a speaker at our Summer Symposium! You can also catch me at not one, but TWO dinner meetings at my Greater Long Beach home.**

I could chalk all of this up to luck, but the truth is I wouldn't have had any of the amazing opportunities I have had without CSTC, and I'm just getting started!

Don't be fooled into thinking this is just an educational organization. It is so much more than that.

*Respectfully submitted,  
Shannon Hall, GLB 1<sup>st</sup> Vice President*

#### OTHER CHAPTER'S MEETINGS

##### INLAND EMPIRE:

3<sup>rd</sup> 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:

3<sup>rd</sup> 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:

2<sup>nd</sup> Wednesday of the month. for information and reservations contact via eMail: Debbie Daniels @ [Debbie.daniels.cstc.oc@gmail.com](mailto: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:

1<sup>st</sup> 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, City of Industry at 6:00 P.M.



#### CSTC's 2019 SUMMER TAX SYMPOSIUM

June 9-12, 2019

Westgate Las Vegas Resort & Casino

Las Vegas, NV

Celebrating the 33rd Annual Symposium

FOR MORE INFORMATION PLEASE VISIT OUR WEBPAGE

<https://www.cstcsociety.org/2019-summer-symposium>

**DEADLINE TO BOOK YOUR RESERVATION AT THE  
WESTGATE IS May 17!!!!**

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### Lacerte User Tip

New! Beginning with Tax Year 2018, California Corporate and S-Corporate Estimated Tax Payments can now be transmitted electronically through the Estimated Tax Wizard.

**This means that CA estimated payments will NO LONGER be transmitted with the filing of the tax return for these filing types.**

If you weren't aware of this during tax season, you may want to return to any clients filed and double check that the estimates have been correctly filed.

*Respectfully submitted,  
Jen Horton, GLB Editor 2019*

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### A Story for You This May

Peter Property Owner came in late this year to do his tax return, and now in addition to all his rentals he tells you he did a 1031 exchange last year. No problem! You took a CE course last summer about all things 1031, right?

Pete hands you his document, including his "Buyer's Final Closing" for the exchange property, and you see the new home is NOT in California... ugh. You remember hearing something in that course about California's new rule to track exchanged properties outside of the state – and now you've got some research to do.

No worries, it's not difficult. Report the 1031 on the tax return, then each year file Form 3840 "California Like-Kind Exchanges" until the property is disposed of in a taxable transaction. *(By the way, I found out this past tax season Form 3840 must be signed by the taxpayer and either mailed or filed electronically with FTB... read the next article!)*

What's that you say? This is the first you've heard of this California Form 3840?

Again, no worries. Ruth Godfrey of the CSTC Inland Empire Chapter will be presenting a 4-hour CE course on all things 1031 this coming summer for the Greater Long Beach Chapter. This "Extension Session" will be followed up by the GLB regular Evening Educational Event – a 2-Hour CE course covering 'how to get the 1031 into the Federal and California tax returns.'

Greater Long Beach is trying something new this year! We're offering four "Extension Sessions" throughout the year, followed by a separate 2-Hour Evening Educational Event which will show you how to take what you learned and get it into the tax returns. Don't miss out! Mark your calendars today and plan to join us!

*Respectfully submitted,  
Jen Horton, Editor*

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### SHOUT OUT TO FTB!

I have to give this shout out to FTB, and it begins with: "My client got a letter..."

I couldn't believe it. I looked and looked over the letter; I read it at least a dozen times. "Why??" I asked myself. "Why did he get this letter? I filed the form??" My heart ached; sigh.

I checked my software; the form FTB said they didn't get was there – all 3 years it was there!

I finally resolved myself to call FTB – just call – this must be a simple mistake, I know I completed the required form each year on a timely filed tax return. So call FTB Practitioner Priority Line I did.

Sure enough, I completed the form – but this particular form '*just happened to be*' one of the very few forms which does not eFile with the return. Each year it needs to be printed separately and mailed into FTB as a standalone form.

The young man I spoke with was so very understanding, so calm – unlike me, so worried! He said it wasn't a problem and that, yes, I needed to have the client sign it and mail it in each year. ***He also noted that it could be signed by the taxpayer and eFiled with the return as "an attachment" – but oh my that sounded complicated! Seems each year there is just so much for us to learn as tax professionals!***

So shout out to FTB for their understanding and calm nature when speaking with a distraught tax professional during the Ides of March! You guys and gals rock!

Oh, the form to be mailed in??? Greater Long Beach has two WONDERFUL Extension Sessions coming up early this summer in June and July – California is the June topic, Like Kind Exchanges is the July topic. Mark your calendars and plan to join us and I guarantee you'll learn all about this standalone form which does NOT eFile.

*Respectfully submitted,  
Jen Horton, Editor*

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### **So Much Wonderful Education To Choose From!**

The Tax Cuts and Jobs Act (TCJA) brought many changes for the 2018 tax season. We lost many deductions on Schedule A – Employee Business Expenses, many forms of Casualty Losses are gone, the deductibility of state and real property taxes are limited – and while some taxpayers saw an increase in their effective tax rate, many taxpayers saw a likewise DECREASE in their effective tax rate.

It was a challenging year, indeed, and while the new Qualified Business Income deduction was tricky to learn, I found – for my particular clients – the tax software handled it

well.... And of course, California didn't conform to most anything in the TCJA.

Now that you've gotten your feet wet with your clients – and I've heard through the proverbial grapevine that several practitioners have many clients on extension – Summer and Fall 2019 will be a fabulous time for strengthening your skills and fine-tuning your knowledge of the TCJA and applying the new tax laws to your clients.

There are so many choices with CSTC for you to find the education you need for the betterment of your business:

- Your Greater Long Beach Chapter is not only bringing you Afternoon Extension Sessions in 2019, but is also bringing in some of CSTC's favorite Symposium speakers to present those seminars! With the addition of these Afternoon Extension Sessions, you may not earn up to 30 hours of continuing education without the need to travel away from home! We hope this will benefit those practitioners on a more stringent budget.
- CSTC's Annual Summer Symposium is right around the corner. **This event will be held at a new location this year –Westgate Las Vegas Resort & Casino, north of the strip.** *It's important that you request to **not be charged the resort fee** if you don't plan to use those services. The fee is \$33.99 **but is optional for this event for CSTC.*** There's a fabulous line-up of speakers at this year's Symposium – favorite speakers from past years' events as well as several speakers new to CSTC with new perspectives and interesting topics! *One name I saw on the list was Monica Haven of Los Angeles – one of my personal favorites – you won't want to miss Monica's sessions!* Symposium offers 33 sessions for up to 24 Hours of continuing education, as well as Keynote Speakers from the IRS, FTB's Taxpayer Advocate, and the ever popular "Stump the Tax Experts" panel session for your enjoyment. Don't forget to visit with the vendors who'll have special offers available for you to cut costs in your business expenses!
- CSTC's Fall Tax & Accounting Form will focus on Non-profits for 2019. The call for speakers has gone out, and the schedule will be coming soon. This event will be held in Sacramento this year; pricing and lodging information will be announced soon, so check back on the Society website often.
- Other Chapters??? Of Course!!! As part of your CSTC membership, you may attend any event at any chapter and receive discounted member pricing! Many chapters are located in central metropolitan areas, so look at the master calendar on the CSTC website and if you like a session being offered at another chapter's venue – by all means, give them a

call then go visit! CSTC is one big happy family, and we love visitors from other chapters!

- Don't Forget! Save The Date! August 19<sup>th</sup> our beloved L.G. Brooks will be presenting "**All Things Taxation & Representation**" at the Greater Long Beach Chapter venue. We'll bring you the pricing and registration information as soon as we can!

So these are the highlights on education for 2019. I hope you'll take a good look at the calendar and find the education events that best suit your lifestyle. I hope to be able to get to many events myself!!!

*Respectfully submitted,  
Jen Horton, GLB Editor 2019*

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## Save The Date!!!

June 26 – California Differences

### Speaker Bio

June Extended Event – 6 Hours California CE

### Eugene Ostermiller, EA, NTPI fellow



Eugene started doing taxes 23 years ago at H and R Block. After 8 years at Block, he formed Tax Matters Inc. in San Francisco with 2 partners, a business that they sold in 2014. He then moved to Sonora CA and opened ERO Tax in 2015. He passed the EA exam in 2001 and has been a speaker for over 15 years.

### Session Summary

June Extended Event – 6 Hours California CE

### California Differences

"Boy is California different! California has always had a lot of differences in its tax law from the federal tax and now there are many, many more. We will review all the old differences, some you may have never been aware existed, and go in depth into the plethora of new ones. We will discuss the differences and how they are shown on the California return"

## Greater Long Beach Chapter – 2019 Officers, Directors & Volunteers

### Officers

President	Nikki LeBrun	310/534-3492	<a href="mailto:nlebrun@sbcglobal.net">nlebrun@sbcglobal.net</a>
1 <sup>st</sup> VP Education	Shannon Hall	562/715-4495	<a href="mailto:sintax1099@gmail.com">sintax1099@gmail.com</a>
2 <sup>nd</sup> VP Education	Frank Farfan	562/865-8868	<a href="mailto:farfan@earthlink.net">farfan@earthlink.net</a>
Secretary	Shobha Bajaj	562/441-6724	<a href="mailto:bajas01@yahoo.com">bajas01@yahoo.com</a>
Treasurer	Nancy Spiegel	714/527-3065	<a href="mailto:nspiegel@pacbell.net">nspiegel@pacbell.net</a>
Past President	Harold LeMaster	714/332-3508	<a href="mailto:hal.lemastereal@gmail.com">hal.lemastereal@gmail.com</a>

### Directors

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

### Roundtable Research

Federal Application	Harold LeMaster	714/332-3508	<a href="mailto:hal.lemastereal@gmail.com">hal.lemastereal@gmail.com</a>
California Conformity	Dennis Kaho	562/421-8523	<a href="mailto:dkaho@aol.com">dkaho@aol.com</a>

### Volunteers

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

## 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 2019 to September 2020** and receive a select "Free" resource book discount valued at approximately \$50. ***Must be a member-in-good standing throughout October 2019 to September 2020***

### 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.



CALIFORNIA SOCIETY OF TAX CONSULTANTS  
**SUMMER SYMPOSIUM**  
 LAS VEGAS, NEVADA

**Registration Information and Fees**

Category	Price
Members	\$575
Staff of Members	\$600
Non-Members	\$675
Sunday Social Guest Tickets	\$40

**Registration fees include:**

Educational sessions and materials, Daily Breakfasts, Sunday Evening Social & Buffet, Refreshment Breaks and Exhibitor Reception.

**Cancellation policy:** Registration cancellations will be accepted in writing until May 15, 2019. A \$100 administrative fee will apply to the refund. No refunds will be given if cancellation notice is received after 5:00 p.m. on May 15, 2019, or for no-show registrants. .

**Summer-Symposium Schedule-at-a-Glance**

	<b><u>Sunday, June 9, 2019</u></b>
3pm	Registration Opens; Exhibitor Set-up
5:20pm-6pm	<b>Welcome Reception for First Time Attendees</b>
6pm-9pm	<b>Welcome Dinner</b> This event is family friendly. (Included with full registration. Guest registration is \$40)
	<b><u>Monday, June 10, 2019</u></b>



6:30am-5pm	Registration and Exhibits
7:30am-9:00am	<b>Session 1: IRS Keynote Presentation and Breakfast</b> <b>Scott Irick Deputy Director, Examination, Small Business/Self-Employed</b>
9:15am-10:05am	Breakout Sessions (all sessions will continue after the break):
	<b>Session 2: 199A - Qualified Business Income Deduction</b> <b>Claudia Stanley, CPA, EA</b>
	<b>Session 3: 1031 Exchanges and Their New Counterpart - Opportunity Zones</b> <b>Ruth Godfrey, EA</b>
	<b>Session 4: Reporting K-1's for Tax</b> <b>Jane Ryder, EA, CPA</b>
	<b>Session 5: Toilets, Tenants &amp; Trash: Capital Gains Tax Reduction Strategies</b> <b>Frank Acuña, Attorney at Law</b>
10:05am-10:20am	Break with Exhibitors
10:20am-12:00pm	Breakout Sessions (continued from before the break):
	<b>Session 2 Continued: 199A - Qualified Business Income Deduction</b> <b>Claudia Stanley, CPA, EA</b>
	<b>Session 3 Continued: 1031 Exchanges and Their New Counterpart - Opportunity Zones</b> <b>Ruth Godfrey, EA</b>
	<b>Session 4 Continued: Reporting K-1's for Tax</b> <b>Jane Ryder, EA, CPA</b>
	<b>Session 5 Continued: Toilets, Tenants &amp; Trash: CG Tax Reduction Strategies</b> <b>Frank Acuña, Attorney at Law</b>
12:00pm-1:20pm	Lunch on own
1:20pm-3:00pm	Breakout Sessions:

	<b>Session 6: California Old School Differences</b> Eugene Ostermiller, EA, NTPI Fellow
	<b>Session 7: Advanced Schedule C Audits</b> LG Brooks, EA, CTRS
	<b>Session 8: The Sharing Economy</b> Karen Joyner, EA
	<b>Session 9: How to Serve Immigrant Mixed-Status Families</b> Antonio Martinez, EA
3:00pm- 3:20pm	Break with Exhibitors
3:20pm- 5:00pm	<b>Session 10: Cryptocurrency, the IRS, and You</b> John Miller, EA
	<b>Session 11: Marijuana Taxation in California</b> William Rogers, MBA, CFP, EA
	<b>Session 12: Dependency in Depth</b> Shannon Hall, EA
	<b>Session 13: Tax Issues for US Citizens Abroad</b> Monica Haven, EA, JD, LLM
5:00pm- 6:00pm	<b>Reception with Exhibitors</b>
6:00pm	Evening on Own
	<b><u><a href="#">Tuesday, June 11, 2019</a></u></b>
6:30am-5pm	Registration and Exhibits
7:30am- 9:00am	<b>Session 14: California Keynote Presentation and Breakfast</b> Susan Maples, CPA, California Tax Payer Rights Advocate
9:00am- 9:15am	Break
9:15am- 10:05am	Breakout Sessions (all sessions will continue after the break):

	<b>Session 15: Appealing Decisions - Audit, OIC, Tax Court, Bankruptcy Court, Federal District Court</b> <b>Gary Quackenbush, Esq</b>
	<b>Session 16: Everything S-Corp!</b> <b>Jane Ryder, EA, CPA</b>
	<b>Session 17: Baby, Oh Baby!</b> <b>Karen Joyner, EA</b>
	<b>Session 18: Engagement Letters</b> <b>LG Brooks, EA, CTRS</b>
10:05am-10:20am	Break with Exhibitors
10:20am-12:00pm	Breakout Sessions (continued from before the break):
	<b>Session 15 Continued: Appealing Decisions - Audit, OIC, Tax Court, Bankruptcy Court, Federal District Court</b> <b>Gary Quackenbush, Esq</b>
	<b>Session 16 Continued: Everything S-Corp!</b> <b>Jane Ryder, EA, CPA</b>
	<b>Session 17 Continued: Baby, Oh Baby!</b> <b>Karen Joyner, EA</b>
	<b>Session 18 Continued: Engagement Letters</b> <b>LG Brooks, EA, CTRS</b>
12:00pm-1:20pm	Lunch on own
1:20pm-3:00pm	Breakout Sessions:
	<b>Session 19: Passive Activity Loss Limitations</b> <b>Eugene Ostermiller, EA, NTPI Fellow</b>
	<b>Session 20: What's my Character?</b> <b>Claudia Stanley, CPA, EA</b>

	<p><b>Session 21: Domestic Tax Issues for Non-Resident Aliens</b>  <b>Monica Haven, EA, JD, LLM</b></p>
	<p><b>Session 22: The Art and Science of Divorce Taxation in 2019</b>  <b>Armand D'Alo, EA, CFP, CDFA and Robbin D'Alo, EA, CLA, CDFA</b></p>
3:00pm-3:20pm	Break with Exhibitors
3:20pm-5:00pm	<p><b>Session 23: California: Do You see What I CA?</b>  <b>Shannon Hall, EA</b></p>
	<p><b>Session 24: Correcting Depreciation - Form 3115 Line-by-Line</b>  <b>Karen Joyner, EA</b></p>
	<p><b>Session 25: Resident vs Nonresident Taxation Differences</b>  <b>Antonio Martinez, EA</b></p>
	<p><b>Session 26: Choice Of Entity. LLC, INC, LP, GP, SP - How To Choose?</b>  <b>Gary Quackenbush, Esq</b></p>
5:30pm-6:30pm	<p><b>**BONUS IRS SESSION ADDED!**</b>  <b>Navigating the IRS and Managing the Aftermath of a Data Breach</b>  <b>Marc Zine, Senior Stakeholder Liaison and Katie Williams, Senior Stakeholder Liaison</b></p>
	<p><u><a href="#">Wednesday, June 12, 2019</a></u></p>
6:30am-5pm	Registration and Exhibits
7:30am-9:00am	<p><b>Session 27: Best Practices - Compliance and Documentation Presentation and Breakfast</b>  <b>Monica Haven, EA, JD, LLM      <i>Class to continue after the break</i></b></p>
9:00am-9:15am	Break
9:15am-10:05am	<p><b>Session 27 Continued: Best Practices - Compliance and Documentation Presentation and Breakfast</b>  <b>Monica Haven, EA, JD, LLM</b></p>
10:05am-10:20am	Break with Exhibitors

10:20am-12:00pm	Breakout Sessions:
	<b>Session 28: Compensatory Stock &amp; LLC Benefits (Options RSU's, ESPP, Etc)</b> Jane Ryder, EA, CPA
	<b>Session 29: Fresh Starts - Installment Agreement, OIC, Tax Lien Relief, Bankruptcy, Innocent Spouse, Injured Spouse</b> Gary Quackenbush, Esq
	<b>Session 30: How to Read a Trust</b> Frank Acuña, Attorney at Law
	<b>Session 31: Tax Penalties &amp; Abatement</b> LG Brooks, EA, CTRS
12:00pm-1:20pm	Lunch on Own
1:20pm-3:00pm	<b>Session 32: Stump the Tax Experts</b>
3:00pm-3:20pm	Break
3:20pm-5:00pm	<b>Session 33: Ethics - What Would You Do?</b> Claudia Stanley, CPA, EA
5:15pm	Grand Prize Drawing

### Classified Ads

#### Cameron Hernandez

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**Contact Hal LeMaster EA, Masters in Taxation:**

[hal.lemastereal@gmail.com](mailto:hal.lemastereal@gmail.com) or 714/332-3508.

#### So-Cal Quality Appraisals:

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### Seeking New Editor !



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

**After a decade of serving as your newsletter editor, I've announced my decision to retire from the position and from the GLB Board of Directors.**

As many of you know, I now live two counties away and it's become increasingly difficult to retain a close relationship with GLB and my duties on the Board.

If you enjoy receiving the GLB Chronicle monthly, please consider joining our team as a volunteer. Editor is an entry level Director position and should only take a few hours a month to perform. Article writing is not a requirement; neither is attendance at any meetings. Keep the Chronicle coming to your inBox!

Thanks for all the years of reading the GLB Chronicle, and please don't let it go by the wayside. Step up, volunteer today! Speak to any Chapter Leader if you're interested ©

Respectfully submitted,  
Jen Horton, GLB Editor

### Address Change???

Have you moved?  
Changed your eMail address?

P-L-E-A-S-E – login to your member account at [cstcsociety.org](http://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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