



California Society of Tax Consultants

Orange County - South Chapter – July 2019

Monthly Meetings are held on the Fourth Tuesday in January and in May through November

July 23, 2019 @ 5:45pm (registration starts @ 5:30pm)

Topic: Everything You Wanted to Know About Compensatory Stock Benefits

Come learn about Stock Options, ESPP, RSUs, RSAs, LLC Equity benefits, Section 83b election and the new Section 83i election. The 2018 tax law changes brought new issues and opportunities for your clients. Are you in a position to explain these choices and the possible tax ramifications to your clients?

Knowledge Level: Intermediate

Speaker: Jane Ryder, EA, CPA

Jane Ryder, EA, CPA has been providing tax preparation, accounting services, and tax collection resolution services since 1980. She runs her San Diego CPA firm, Brass Tax Ryder Professional Group, Inc., and writes and speaks on many income tax, business compliance and accounting topics.

Jane has a business-centric practice, preparing and consulting on tax, accounting, and compliance matters for Corporations, S-corporations, LLC's, Partnerships, and Trusts. She also specializes in IRS and state agencies collection problems, payment plans, audit representation, audit appeals, offers in compromise, and other compliance related issues.

Federal Tax Law: 2 hours

IRS: 18QC1-T-01xxx-19-I

CTEC: 1000-CE-4xxx

DINNER RESERVATION

The South Orange Chapter meeting is Tuesday, July 23, 2019.

PLEASE EMAIL (preferred) Michael Locke (mjlocke@sbcglobal.net) by the deadline so that a meal will be available for you. **Please be sure to tell us your meal choice!** If you have any special dietary needs such as a vegetarian plate please advise when you make your reservation. You must make a reservation. If you make a reservation and are a no show, you will be billed for the dinner at the member cost. You must also make a reservation so that there are sufficient educational materials and outlines.

Reservations are expected by 5:00 PM, Thursday, July 18, 2019

MEMBERS with reservations \$40; with late or no reservations, \$50

NON-MEMBERS \$60

Payment by cash or check payable to CSTC can be made at the door. (Returned Check Charge is \$30).
Credit cards cannot be accepted.

Dinner service starts at 5:45pm!!

ENTREE CHOICE:

New York Steak

Chicken Alfredo

Poached Salmon

Meal includes salad and dessert.

***** Drinks – Coffee, Tea, & Soda – “No Charge”

***** Alcoholic Beverages are “EXTRA”.

Time: Sign-in/Registration: 5:30pm

EMAIL the following registration info to Michael Locke (mjlocke@sbcglobal.net):

Entrée choice, name, phone, email, PTIN, professional designation & license number.

***** MEETING LOCATION:**

The Vintage Steakhouse

26701-B Verdugo St. San Juan Capistrano, CA 92675 Phone: (949) 661-3400

Free parking in the lot in front of the restaurant. There is reserved free restaurant parking to the right of the restaurant, in the adjacent parking lot. Parking is available in the parking structure at the end of the street, but payment may be required (sorry 😊).

Upcoming 2019 Meetings:

August 27: Kevan McLaughlin, JD, LL.,M Certified Tax Law Specialist: Ethics

September 24: Lila Fedler, FTB: California Tax Updates

October 22: TBA

November 19: TBA

ORANGE COUNTY - SOUTH CHAPTER OFFICERS & DIRECTORS:

President:	Guy Liford, EA	Email: asktaxguy@yahoo.com 949-683-6311
Vice President:	Michael Locke, EA	Email: mjlocke@sbcglobal.net 949-582-8381
Treasurer:	Donna Hunt, EA	Email: donna@dhtaxacct.com 949-586-6225
Secretary:	Lisa Cruz	Email: lisarcruz@yahoo.com 949-308-8448
Director:	Deborah Roberts, CPA	Email: rw@robertsandwise.com 949-215-7447

CSTC MISSION STATEMENT

To promote professionalism by providing quality educational events for tax professionals, by creating and encouraging networking opportunities for members and by advocating professional standards and positions within the tax industry.

Society Office

320 Pine Ave., Suite #1050

Long Beach, CA 90802

Phone: 949-715-4192 Fax 949-715-6931

Visit us at www.cstcsociety.org

