

# California Society of Tax Consultants

Volume - 2019  
Issue - January-April  
Editor - Jen Horton

Greater Long Beach Chronicle



Phone: 949/715-4192

Fax: 949/715-6931

[WWW.CSTCSOCIETY.ORG](http://WWW.CSTCSOCIETY.ORG)

## MISSION STATEMENT

CSTC advances professionalism within the tax industry by:

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

### GLB 2019 Chapter Meetings Held At:

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

#### Roundtable Event / January-April

**Cost:** includes buffet breakfast 8:30AM  
\$40.00 Members *with prior reservation*  
\$50.00 Members *no reservation* & Guests

**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  
Low, Low Pricing for 2019 only !!!**

*Students may choose to attend the 4-Hour Extension  
session only, the 2-Hour Evening session only, or both  
sessions.*

#### Extension (Afternoon Only) (Cost TBD)

Only offered June, July, September, October  
**Cost:** includes snack break mid-event  
\$\$\$\$ Members *with prior reservation*  
\$\$\$\$ Members *no reservation* & Guests

**Meeting: 2:00PM to 6:00PM**  
4HRs CE (type TBD)

#### Evening Educational Event / May – November

**Cost:** includes buffet dinner 6:30PM  
\$40.00 Members *with prior reservation*  
\$50.00 Members *no reservation* & Guests

**Meeting: 6:00 to 9:00 PM.**  
2HRs CE (type TBD)

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

Dates to be announced



APPROVED CONTINUING  
EDUCATION PROVIDER



APPROVED CONTINUING  
EDUCATION PROVIDER

## ROUNDTABLE EVENTS

1HR Fed Tax, 1HR Fed Update, 1 HR CA

January 27 – Eggs Benedict, fruit, country potatoes,  
bacon

February 10 – Scrambled Eggs, fruit, hash browns,  
sausage

February 24 – Scrambled Eggs, fruit, country potatoes,  
bacon

March 10 – Breakfast Burrito w/bacon, fruit, country  
potatoes

March 24 – Scrambled Eggs, fruit, hash browns,  
sausage

April 7 – Scrambled Eggs, fruit, hash browns, sausage

Our Roundtable Events include a buffet breakfast –  
complete with juice, coffee, hot tea and pastries!

Bring your tough tax questions to our tax season  
Roundtable Event and discuss possible solutions with  
other members; our research team will do their best to  
get you both the federal and California answers  
utilizing The TaxBook and a leading California tax  
research book.

*For reservations 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***

**PAGE INSIDE THIS ISSUE:**

- 1** Current Evening Educational Event & Menu
- 2** 2019 Event Calendar
- 3** Article: "So – You're Not a Tax Professional, but..."
- 4** 2018 GLB Board of Directors & Chapter Benefits
- 5** Classified Ads – Editor Position Available
- 6**
- 7**
- 8**

**2019 Prospective Event Calendar****Roundtable Events**

Our Roundtable Events include a buffet breakfast – complete with juice, coffee, hot tea and pastries!

Bring your tough tax questions to our tax season Roundtable Event and discuss possible solutions with other members; our research team will do their best to get you both the federal and California answers utilizing The TaxBook and a leading California tax research book. 2019 event dates are:

**Breakfast is served at 8:30 AM**

- January 27 – Eggs Benedict, fruit, cntry potatoes, bacon
- February 10 – Scrambled Eggs, fruit, hashbrowns, sausage
- February 24 – Scrambled Eggs, fruit, cntry potatoes, bacon
- March 10 – Breakfast Burrito w/bacon, fruit, cntry potatoes
- March 24 – Scrambled Eggs, fruit, hashbrowns, sausage
- April 7 – Scrambled Eggs, fruit, hashbrowns, sausage

**Presentations begin at 9:00 AM**

Each event will provide continuing education credits of:

**1 hr Federal Tax; 1 hr Federal Update; 1 hr California**

**Evening Educational Events**

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

**Extension Sessions begin at 2:00PM****Dinner is served at 6:00PM****Evening Sessions begin at 7:00PM**

- 5/29 Evening Session  
Speaker: Shannon Hall  
Topic: Ethics  
Chicken buffet
- 6/26 Afternoon Extension Session  
Speaker: Eugene Ostermiller  
Topic: California Differences  
Evening Session  
Speaker: Eugene Ostermiller  
Topic: California Differences, continued  
Beef Brisket

- 7/31 Afternoon Extension Session  
Speaker: Ruth Godfrey  
Topic: Like Kind Exchanges  
Evening Session Speaker: Ruth Godfrey  
Topic: Like Kind Exchanges - continued  
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, continued  
Beef Stroganoff buffet
- 10/23 Afternoon Extension Session  
Speaker: George Van Buren  
Topic: TBD  
Evening Session Speaker: George VanBuren  
Topic: TBD  
47<sup>th</sup> Anniversary – Celebration with cake  
Chicken buffet
- 11/20 Speaker: Shannon Hall  
Topic: TBD (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 working diligently to bring you one of CSTC's favorite Symposium speakers to this 8-hour day of learning and camaraderie. Stay tuned for an announcement of this and all our speakers and topics for 2019!!!

- 8/19 Speaker: TBD  
Topic: TBD

**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

### **LAST CHANCE TO RENEW YOUR CTEC WITHOUT RETAKING THE 60-HOUR COURSE**

[https://www.ftb.ca.gov/professionals/registered\\_tax\\_preparers.shtml](https://www.ftb.ca.gov/professionals/registered_tax_preparers.shtml)

A California Registered Tax Preparer (CRTP) must annually renew their registration with the California Tax Education Council (CTEC) each year before October 31st.

We've been reminding you to renew your CRTP license for the past two months. "If you fail to renew your CTEC registration by January 15, (CTEC) will consider you a new tax preparer and subject to the new preparer registration requirements." (which means you'll be required to take the 60-Hour CTEC Qualifying Course again)

*Respectfully submitted,  
Jen Horton, GLB Editor 2019*

\* \* \* \* \*

**"So – You're Not a Tax Professional, but  
you want to try your hand at taxes???"**

*Reprinted from  
FTB Newsroom*

### **"New Video Training Course Makes It Easier To Become (an Unpaid) Tax Prep Volunteer**

**Sacramento** – The Franchise Tax Board (FTB) today released a new, free video training course aimed at helping volunteers become IRS-certified to prepare income tax returns during tax season.

The 11-part course, taught by FTB's Volunteer Income Tax Assistance (VITA) trainers and spanning just under two hours total, is available at FTB's website, [ftb.ca.gov](http://ftb.ca.gov).

VITA volunteers spend the fall and early winter training for tax season. Volunteers then give their time to prepare returns for low- to moderate-income families for free in communities around the state.

"Now from your own home you can learn to prepare tax returns and help members of your community in a meaningful way," State Controller and FTB Chair Betty T. Yee said.

The new video course covers what volunteers need to know about federal and state income tax returns, including changes brought about by recent federal tax reform.

In-person VITA training is also available around the state. To find a location near you, visit:

<https://www.ftb.ca.gov/volunteer>

*VITA is administered by the IRS and supported by FTB. The program is an important way for families to get their federal and state tax returns done for free, allowing them to receive*

*any refund they are due and in some cases connect with the cash-back California Earned Income Tax Credit (CalEITC)"*

### **"Are You Ready to Take it to the Next Level???"**

Whether you're looking for a side-business to make a little extra spending money, or looking for a new career and have decided that the business of taxation sounds interesting to you, then look toward The California Society of Tax Consultants (CSTC) for your education needs.

Not only does CSTC offers the 60-hour qualifying education course required by the California Tax Education Council (CTEC) to become a paid preparer of tax returns in the State of California, but also offers the necessary continuing education courses to maintain that licensure. CSTC has in-person training in many cities across the state – some as short as 2-hours, some full-day events – as well as conferences offered in both Las Vegas and Reno, Nevada. CSTC offers courses online, for those unable to travel away from home.

Check out our website – [cstcsociety.org](http://cstcsociety.org) – and/or consider visiting one of our local Chapters in person to find out what we're all about!

*Respectfully submitted,  
Jen Horton, GLB Editor 2019*

\* \* \* \* \*

### **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:**

1<sup>st</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 6:00 P.M.

**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 Membership	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	
Reservations	Dennis Kaho	562/421-8523	<b><u>NO EMAIL RESERVATIONS ACCEPTED</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>
Govt Affairs/Technology	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.lemasterea@gmail.com">hal.lemasterea@gmail.com</a>
California Conformity	Dennis Kaho	562/421-8523	

**Volunteers**

Nominations Chair	Stephen Bruce	541/507-1789	<a href="mailto:brucetax@gmail.com">brucetax@gmail.com</a>
CSTC Chapter eMail			<a href="mailto:cstcglb@gmail.com">cstcglb@gmail.com</a>

**CSTC GLB Members Also Receive...****Discounted Pricing**

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

**Attend 9 GLB educational events**

between October 2018 to September 2019 and receive a select "Free" resource book discount valued at approximately \$50. **Must be a member-in-good standing throughout October 2018 to September 2019**

**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 AdsCameron HernandezProfessional Trustee Services

Fiduciary Accounting Services:

- Estate Accounting Services
- Trust Accounting Services

You can outsource to me; or

have your client contact me directly at **562/270-5586**

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

So-Cal Quality Appraisals:

Steven A. Hassoldt, Certified Residential Appraiser

Telephone: 310/371-5978

Email: [socalquality@gmail.com](mailto:socalquality@gmail.com)

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.

*I'd like to take the opportunity to thank you for allowing me to bring you the Greater Long Beach Chronicle since 2010. I've enjoyed creating this publication to keep members informed, but I've decided that 2019 will be my last year to serve the Chapter as Editor of the GLB Chronicle.*

*If you enjoy receiving the GLB Chronicle monthly, please consider joining our team as a volunteer this year. 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 this publication coming to your inBox! Contact Jen at [cstcglb@gmail.com](mailto:cstcglb@gmail.com)*

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.

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](mailto: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.*

***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!***

