

**CALIFORNIA SOCIETY OF TAX CONSULTANTS
INLAND EMPIRE CHAPTER
Educational Dinner Meeting
Wednesday, October 17, 2018**



California Society of Tax Consultants
Inland Empire Chapter

We meet at the DoubleTree Hotel, 555 W Foothill Blvd, Claremont, CA 91711

ETHICS—CIRCULAR 230

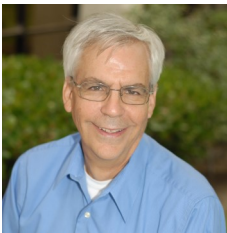
CTEC # 1000-CE-0000—IRS Program # 18QC1-T-00000-18-I—2 hours Ethics—Intermediate

In this course we will discuss various topics concerning ethics and professional conduct and how they relate to tax professionals, enrolled agents, and tax firms. Critical Circular 230 requirements concerning competence, due diligence, conflicts of interest, and continuing education will be covered, and we will review current IRS enforcement programs in regards to return preparers and practitioners, including sanctions and penalties. We will review best practices for information security and protecting clients' personal information and the latest IRS efforts to combat identity theft and fraud.

After completing this course, students will be able to:

- Describe how Circular 230 provisions apply to tax firms and tax professionals.
- Identify current IRS enforcement programs, sanctions and penalties relating to tax professionals.
- Describe the latest IRS programs regarding identity theft and fraud.
- Incorporate best practices relating to confidentiality, privacy, and information security into their daily work.

SPEAKER: Chris Rubino, EA



Chris Rubino, EA has worked for TaxAudit.com, the nation's largest provider of prepaid audit defense services, for ten years, handling hundreds of audits. Since 2011, he has been a senior member of their Research and Education department. In addition to writing and editing education materials, Chris conducts research on multiple complicated tax matters and answers inquiries from the public. He also maintains his own tax preparation practice. Prior to entering the tax field Chris worked in financial advisement.



This presentation has been designed to meet the requirements of the Director of Practice of the Internal Revenue Service; the California State Board of Accountancy; and the California Tax Education Council including code 31 of Federal Regulations 10.6(g). This does not constitute an endorsement by these groups. A listing of additional requirements to renew tax-preparer registration may be obtained by contacting CTEC at PO Box 2890, Sacramento, CA 95812-2890, or phone CTEC at 1-877-850-2832, or on the Internet at www.ctec.org.

MEETING LOCATION

DoubleTree Hotel Claremont
555 W Foothill Blvd
Claremont, CA 91711

Wednesday, October 17, 2018

Sign in at **5:30 pm** — Dinner **6:00 pm**

Speaker: **7:00 pm to 9:00 pm**

For Reservations and Menu Preference:

Phone **909.575.1066** (message phone)

MEETING COST (dinner and 2 hours of education)

- **\$35 for members with reservations made on or before Saturday, October 13, 2018, 11:59 pm**
- **\$50 for non-members, walk-ins and late registrations**

To make a reservation call: 909.575.1066 (message phone) OR email: CSTC.Inland.Empire@gmail.com. Please leave your name, PTIN and your EA, CTEC or CPA # when making your reservation. Pay at the event with check or cash (we are not able to accept credit cards).



== MENU ==

House Salad with Ranch and Italian dressings
Fresh Rolls and Butter

Main Menu:

- **Baked White Fish with lemon pepper**
Chef's Choice Starch
Chef's Choice Vegetables
- OR**
- **Large Entrée size Baked Potato**
With the following vegetarian toppings on the side:
Vegetarian Chili, Shredded Cheddar & Jack Cheeses, Steamed Broccoli, Butter, Sour Cream & Chives

Coffee, Ice Tea
Chef's Choice Dessert—NO chocolate

If you signed up for our new 2018 permanent dinner list at the May 16, 2018 meeting, you do not have to call in your reservation. However, if you are on the list and are unable to attend please call and cancel, as a meal will be ordered for everyone on the list and we will be billed for all meals ordered. If you are not on the list and made a reservation and are unable to attend, you must cancel your reservation by **Saturday, Oct, 13, 2018, 11:59 pm otherwise you will be billed for the dinner. Be sure to call 909.575.1066.**