



Orange County - South Chapter – September 2018

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

September 25, 2018 @ 6pm (registration starts @ 5:30pm)
Rancho Capistrano Winery – address below.

Topic: ETHICS

Level: General

Understand why the New Tax Law may result in more enforcement action by IRS. Be familiar with current enforcement programs by OPR and IRS in regards to return preparers and practitioners, and with areas that IRS is paying particular scrutiny to with regards to potential Circular 230 violations. Understand the recordkeeping requirements for continuing education, the potential penalties that may be assessed against practitioners, and when those are applied. Understand what documents are protected under Section 7525's privilege, what documents are not protected, and when such privilege can be invoked and by whom. Understand and be able to identify when a conflict of interest exists when dealing with taxpayers, either as a return preparer or audit representative.

Speaker: Roger Garay, MBA, EA

Roger Garay, E.A., is the President and one of three co-owners of On Line Bookkeeping & Tax Service, Inc., a professional service corporation in the same location since 2002, offering its Clients a full array of business consulting, tax preparation and representation, and bookkeeping services.

Roger has a BS in Electrical Engineering from Manhattan College School of Engineering, an MBA from the University of Chicago and an MS in Business Administration (Finance and Marketing) from the University of Southern California. Concurrent to his work in Industry, above, Roger was Adjunct Professor of Business and Accounting in Academia (U. of Redlands and U. of Phoenix), was seasonally employed by Intuit (makers of TurboTax and QuickBooks, as well as LACERTE and Pro Series tax software) as a Quality Assurance Analyst to rigorously test, prior to release, their tax preparation software.

Ethics Tax Law Credits: 2 hours

IRS: 18QC1-E-010xx-18-I

CTEC: 1000-CE-4xxx

DINNER RESERVATION

The South Orange Chapter meeting is Tuesday, September 25, 2018.

PLEASE mail, fax or (preferred) EMAIL (mjlocke@sbcbglobal.net) or phone (949-582-8381) 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 Debbie Roberts 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, September 20, 2018

MEMBERS with reservations \$40 - NON-MEMBERS or no reservation \$50

Payment by cash or check payable to CSTC can be made at the door. (Returned Check Charge is \$30).

ENTREE CHOICE:

Shrimp Scampi
Variety of Flatbreads

Meal includes salad and dessert.

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

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

Time: **Registration: 5:30** pm

EMAIL the following info to: Michael Locke, mjlocke@sbcbglobal.net.

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

***** MEETING LOCATION:**

Rancho Capistrano Winery

26755 Verdugo St., San Juan Capistrano, 92675

Free parking in structure located across the street, and in the lot behind restaurant.

949-481-6682

Upcoming 2018 Meetings:

October 23: **California Update** - Marc Narlesky, CPA, FTB

November 27: **Now that the client has died** - Gary A. Quackenbush, Esq.

December: No Meeting

January 22, 2019: **Federal Tax Update** - IRS

ORANGE COUNTY - SOUTH CHAPTER OFFICERS & DIRECTORS:

President:	Michael Locke, EA	Email: mjlocke@sbcglobal.net 949-582-8381
Vice President:		
Treasurer:	Donna Hunt, EA	Email: donna@dhtaxacct.com 949-586-6225
Secretary:	Deborah Roberts, CPA	Email: rw@robertsandwise.com 949-215-7447
Director:	Guy Liford, EA	Email: asktaxguy@yahoo.com 949-683-6311
Past President:	Marti Rogna	Email: 4marti@cox.net 949-374-4256

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
65 Enterprise
Aliso Viejo, CA 92656
Phone: 949-715-4192 Fax 949-715-6931

Visit us at www.cstcsociety.org

