



California Society of Tax Consultants

www.cstcsociety.org

# TEMECULA VALLEY

Improving the tax industry, one professional at a time

September 2018

## Meeting Schedule

### Monthly Meeting

First Wednesday of each month at 5:30 pm

Richie's Real American Diner 40651 Murrieta  
Hot Springs Rd Murrieta CA 92562

Phone: 951-696-5504

### Morning Breakfast Roundtable



Third Wednesday - 8:30AM  
Richie's Real American Diner

Wednesday Morning breakfast roundtable meetings. **Got a problem?** Join us. This is an informal roundtable format.

## CSTC –Temecula Meeting Agenda

- 4:30 PM Board Meeting
- 5:30 PM Education Program
- 6:30 PM Dinner Served
- 7:00 PM Education Program
- 8:00 PM End of Meeting

**Members: \$ 32**

Guests: \$ 48

**This Month's Meeting: September 5, 2018**

## 2018 Tax Reform Changes

Individual, Business & Pass Through Changes

Presented by RJS Law:

### Allison D.H. Soares, Partner

Ms. Soares is a Partner at RJS. As a lawyer, she has representative experience defending individuals and entities before the Internal Revenue Services (IRS), Franchise Tax Board (FTB), Employment Development Department (EDD), and State Board of Equalization (SBOE).

In addition to having a JD and Master of Laws in Taxation, Ms. Soares has an MBA in Forensic Accounting. Ms. Soares advises an array of clients on complex business transactions and has an in-depth knowledge of corporate, contract, and tax law. Currently, Ms. Soares provides information to clients regarding avoidance or resolution of problems with federal, state, and local taxing authorities. Ms. Soares is also an adjunct professor at San Diego State University teaching a course on Tax Procedures, Practice and Ethics at the Charles W. Lamden School of Accountancy. In 2015, 2016, and 2017, she was named Best of the Bar by the San Diego Business Journal.

### Brendan O'Connor

Brendan O'Connor is a Senior Associate Attorney at RJS LAW. In addition to being an attorney, Mr. O'Connor is also a Certified Public Accountant. He holds both a Master of Science in Taxation and a Master of Laws in Taxation. Mr. O'Connor's practice centers on representing individuals and businesses before the Internal Revenue Service (IRS), Franchise Tax Board (FTB), Employment Development Department (EDD), and State Board of Equalization (SBOE). Mr. O'Connor has extensive experience in the field of tax controversy, litigation, and domestic and international tax planning.

## Message from the President



### Volunteer opportunities:

- **President**
- **Vice President**
- **Secretary**

CSTC needs YOU!

If you have not visited the CSTC website lately I encourage you to do so.

<https://www.cstcsociety.org/>

Membership gives you access to many benefits.

*Catherine J Buckingham, EA*

Dear CSTC Temecula Valley Members,

With the disparity between IRS and FTB tax calculations, members should consider adding their input to the once a month breakfast meeting. CSTC members will receive one hour of CE. This year we have the Tax Cuts and Jobs Act (TCJA).

Needless to say, the cost of Continuing Education is now in excess of \$20.00 per hour. The recent sold out Spidell Tax Reform Act (R.H. 1) cost seminar was of \$28.00 per hour. This also included a "free" lunch. Of course, the caliber of speakers may not equate with the professional speakers. However, the IRS and FTB tax law information is disseminated to all tax practitioners.

Already, Alice Perez, has been in contact with the FTB for handouts for the July and August. The purpose is to satisfy various course data requirements of California licensed tax practitioners. Alice is the coordinator for the July and August round table discussion



## TEMECULA BOARD MEMBERS

Officers	2018
President Catherine Buckingham	(951) 907-1779 <a href="mailto:ctb1ea@gmail.com">ctb1ea@gmail.com</a>
First Vice Pres	POSITION OPEN
Secretary Pam Sosa	(951) 686-9639 <a href="mailto:psosa.smfs@sbcglobal.net">psosa.smfs@sbcglobal.net</a>
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Director Mike McLean	(949) 874-4872 <a href="mailto:mikemclean@gmail.com">mikemclean@gmail.com</a>
Director Elyse Beltz	(951) 223-7200 <a href="mailto:elyse@qualitytaxsupport.com">elyse@qualitytaxsupport.com</a>
Director Jack Corlett	(951) 246-4824 <a href="mailto:jw.corlett@yahoo.com">jw.corlett@yahoo.com</a>
Director Gloria Williams, EA	(951) 928-6283 <a href="mailto:gloriawilliams1@gloriawilliamsa.com">gloriawilliams1@gloriawilliamsa.com</a>
Director Lane McKellar	(951) 746-2192 <a href="mailto:lamac1@ca.rr.com">lamac1@ca.rr.com</a>
Director Pam Johnson	(951) 377-2255 <a href="mailto:palmag42@gmail.com">palmag42@gmail.com</a>

### Upcoming Meetings:

10/03/2018 Death of a Taxpayer  
 11/07/2018 CA Update – CTEC 2 hrs CA  
 12/06/2018 Office of Tax Appeals

Discount on Spidell Seminar in January!

Bring your check to the September meeting made out to: SPIDELL