



California Society of Tax Consultants

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## **Orange County - South Chapter – November 2020**

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

### **2020 Tax Update - COVID, CARES, PPP, SECURE ACT** **OC South County Virtual Chapter Meeting**

#### **Date/Time:**

Thursday November 12, 2020  
4:00 PM to 6:00PM

#### **Location:**

Online Meeting via Zoom

This will be Zoom Meeting. Once you register and pay, the Zoom link will be provided for you to log in at the designated meeting time. **Zoom does require registration before entering the meeting.** Once the meeting is completed, you will receive an evaluation form and your attendance certificate via email.

#### **Topic: 2020 Tax Update - COVID, CARES, PPP, SECURE ACT**

#### **Description:**

Don't wait until January to try to get up to speed on the new tax laws. With so many new laws and so many changes to those new laws, it's imperative that we stay on top of them so we can answer our clients' questions now as well as offer better tax planning advice. We'll cover the tax aspects and the implications of the new laws and programs -- the CARES Act, COVID-19 relief, the SECURE Act, PPP and EIDL loans, new payroll tax deferrals -- and provide tax-planning tips.

## **Presenters:**

**Ruth Godfrey, EA and Linda Dong, EA**



**Ruth Godfrey, EA**

**Ruth Godfrey has been an Enrolled Agent since 1984. She owned her own tax practice from 1981-2002, formed a partnership in 2001 and then incorporated in 2005. She has been a member of the Inland Empire Chapter of CSTC since 1981, and has served CSTC as President of both her Chapter and the Society. She is currently Parliamentarian for CSTC, Chairman of the Audit Oversight Committee for CTEC, and Secretary-Treasurer for the National Society of Accountants (NSA). Her college major in Psychology has helped her with the counseling needed to guide her clients. She finds real estate one of her favorite areas of tax preparation. Ruth was an active real estate licensee for several years specializing in 1031 exchanges. She prepares approximately 325 individual, business, trust and 990 returns annually. Some actually correctly.**



**Linda Dong, EA**

**Linda Dong graduated with honors from the University of Illinois in Chicago with a degree in Accounting. She went to work for the IRS, where she received a very thorough training in taxes and began auditing corporations. Not liking the adversarial relationship inherent in tax audits, Linda left the IRS and started a tax and accounting practice from her home. She grew her practice to include four employees, but eventually downsized and is now once again a**

sole practitioner working out of her home office. She provides tax and accounting services to individuals, small businesses, and nonprofit organizations. Linda has been an Enrolled Agent (EA) since 1982. Her credentials from the Accreditation Council of Accountancy and Taxation include Accredited Business Accountant (ABA) and Accredited Tax Advisor (ATA). She is a QuickBooks ProAdvisor and frequently teaches classes in accounting and tax to other professionals. Linda is currently serving as First Vice President of the California Society of Tax Consultants and Secretary-Treasurer of the Wine Country Chapter.

### **CPE Information:**

IRS: 18QC1-U-01406-20-O

CTEC: 1000-CE-4812

2 Federal Update hours (Topics covering new tax laws)

**Knowledge Level:** Intermediate (Basic knowledge helpful)

### **Cost:**

Registration Fee (Member): \$20

Registration Fee (Non-Member): \$50

## **2020 California Update** **OC South County Virtual Chapter Meeting**

### **Date and Time:**

Tuesday, November 17, 2020

4:00 p.m. - 6:00 p.m.

### **Location:**

Online Meeting via Zoom

This will be Zoom Meeting. Once you register and pay, the Zoom link will be provided in your confirmation email for you to log in at the designated meeting time. **Zoom does require registration before entering the meeting.**

## Topic: 2020 California Update

In our California Update presentation the topics to be addressed during this presentation generally include:

- Taxpayers' Rights Advocate's Office
- Current Issues
- Legislation
- Bills of Interest
- Conformity
- Earned Income Tax Credit (EITC)
- Audit Issues
- Collection Topics
- Tax Appeals Assistance Program (TAAP)
- Website Redesign
- Communicate with FTB

## Speaker: Lila Fedler



Lila Fedler is a Franchise Tax Board spokesperson and serves as a Technical Assistant to the Advocate. Lila is an Enrolled Agent with the Internal Revenue Service and began her career with the Franchise Tax Board in 1980. Lila currently works directly with the Taxpayer Rights' Advocate to assure that the taxpayers have been afforded the protections of the Taxpayers' Bill of Rights. With more than 37 years, Lila has acquired a broad range of experience covering both personal income and corporation tax laws. In addition to her experience as a Franchise Tax Auditor, Protest Hearing Officer, and Audit Technical Specialist and Reviewer, she worked in the private sector as a Senior Manager in the state and local tax practice at a top public accounting firm, headquartered in the West, providing consulting services to public and private middle-market enterprises in many different industries.

### CPE Information:

CTEC: 1000-CE-4814

IRS: N/A

2 California hours (Topics covering California law issues)

### Registration:

\$10 for members

\$40 for non-members

### Upcoming 2021 Meetings:

January 12, 2021

May 25, 2021

June 22, 2021

July 27, 2021  
August 24, 2021  
September 28, 2021  
October 26, 2021  
November 16, 2021

## **ORANGE COUNTY - SOUTH CHAPTER OFFICERS & DIRECTORS:**

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## **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.

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**Visit us at [www.cstcsociety.org](http://www.cstcsociety.org)**

