



CSTC SOUTH ORANGE COUNTY CHAPTER REPORT

1. 2020 Chapter Monthly Dinner Meetings

- July 28 - No Meeting
- August 25 – No Meeting
- September 21–23 – 28 & 30 – Business Bootcamp via Zoom
- October 5 & 7 - Business Bootcamp via Zoom
- November 24 – Covid Cares PPP Secure Act // FTB CA Tax Update
- December - No Meeting Normally (I will suggest Christmas Party with Roundtable Tax Discussion free for OC South Members)

2. OFFICERS AND DIRECTORS:

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3. MEMBERSHIP REPORT:

Membership is holding steady with 24 members and one student member.

We lost our current venue at Vintage Steaks and is actively looking for a new great venue to hold a live meeting when the current pandemic covid19 stay at home order is fully lifted and safe to hold a live meeting.

4. NEW IDEAS:

With the current pandemic Covid19 live meetings wherein it is considered a gathering, we were thinking to coordinate with the Society of introducing and offering to our local members, CSTC academy and other chapters Zoom meetings for CE.

We are still in the process of laying out options to offer our local members education hours to meet their CE needs for 2021 tax season requirements.

For September and October Dinner meetings, we partnered with Orange County to jointly host the Business Bootcamp which will be 6 sessions of 3 hours each for a total of 18 hours CE credits.

5. CHAPTER CONCERNS:

Table in the box has not arrived and may be a good membership booster after the lockdown and Live meeting will be offered.

New Meeting Venue for Live meeting still in the works.

New and Alternative plan of offering CE (Education hours) for the members.

Financial Report submitted by our Treasurer, Lloyd Boucher via Verifyle

Respectfully submitted,

Lisa Cruz, MBA/IRS ITIN CAA
President
Orange County South
09/20/20