



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

October 2026

In This Issue...

From the CSTC President • Save the Date for the 2027 Summer Symposium - Registration Opening SOON! • Classified Ads - A CSTC Member Benefit • October Wednesday Webinars • Upcoming Chapter Events • Welcome New CSTC Members • Legislative Advocacy • News from the IRS • Join CSTC! • CSTC Member Benefits • Thank You to our 2026 Summer Symposium Sponsors and Exhibitors • Follow CSTC on Social Media!

From the CSTC President

If you're anything like me, October took you by surprise this year. It really does seem like May was just a few weeks ago. Mind you, I'm not complaining. October is my favorite month, and not just because it means that tax season is finally, at long last, over for the year. Now, there's a long way between now and the 15th, but we're going to make it.

By now, most of you know that spooky season is my favorite time of year. Between tax returns, webinars, and dinner meetings, I'll be sneaking out to Halloween Haunt and a few other spooky events. I've also got my 31 Days of Spooky accessories and clothing lined up for the year, so if you're friends with me on social media, I have some new additions to my collection that I can't wait to show off.

As the scent of pumpkin spice fills the air, that can only mean one thing: CTEC renewal deadline! Still missing hours? Check the CSTC schedule. We have an ethics webinar coming up soon (REALLY soon) and many chapters have California hours scheduled for the next few weeks. Whatever you need, we've got you covered.

Now that we're back on our calendar year, nominations for the Society Board of Directors will be landing in your inbox soon. Don't worry, we're not going to send them before the deadline. Serving on the Society Board is an amazing way to give back and to help shape the future of this organization. I would encourage anyone who has ever thought about getting involved to self-nominate for the coming board year.

The Symposium committee is hard at work reviewing the submissions from our call for speakers. I might have taken a sneak peek at the list, and I have to say, they have their work cut out for them. There were so many amazing submissions this year, which tells me that word is getting out about our little event. I am beyond excited about the theme this year, and I cannot wait to go to Camp CSTC!

I wish you a smooth end to the tax season, and I hope to see you at one of our upcoming events.

Shannon Hall,
CSTC President

SAVE THE DATE FOR THE 2027 SUMMER SYMPOSIUM!
Registration Opening SOON!



CSTC Classified Ads - A Member Benefit



Office Space Available

Office Available in a Class A building, (Promontory Building) 11440 West Bernardo Court, Rancho Bernardo \$450/month (includes internet, utilities). Availability Jan 2027, flexible term. Office does have a window. Prefer Seasoned Tax Professional in North County.

For more information, contact Susan S. Alefi at 925-786-1490

Position Wanted

Valiante Tax is seeking a motivated & meticulous Tax Preparer to join our growing team. Role entails communicating with clients, preparing individual tax returns, reviewing & loading returns through e-filing.

Link to job description: <https://valiantetfm.com/wp-content/uploads/2026/06/VTFM-Tax-Preparer-JBA-06.09.2026-1.pdf>

For more information, contact Jason Valiante at 714-710-3424

Practice for Sale

Small tax prep practice for sale in SF Bay Area. The gross revenue of ~\$ 50K is derived from 50+ individuals and several entities. Approximately 75% of clients remit their data electronically, while the rest of clients drop off or mail in their document with only a few people coming in.

For more information, contact Luda Lavrentieva at 510-558-9746



Want to advertise with CSTC?

CSTC Members are welcome to advertise in the CSTC Reporter. The member rate is \$45 per quarter, per ad, with a maximum of 50 words. If you wish to place an ad in more than one category, please submit a separate form for each category.

Submissions are limited to 50 words and may include hyperlinks for additional information. Ad content will only be reviewed after confirmed receipt of payment. The CSTC Reporter is emailed on the first business day of each month to 55,000+ contacts. Advertisement categories include:

- Help Wanted
- Position Wanted
- Office Space Needed
- Office Space Available
- Practice for Sale
- Looking to Buy a Practice
- Furniture/Equipment for Sale
- Furniture/Equipment Needed

Submissions will be reviewed by editors for approval by the 15th of the month. If approved, the ad will be included in the Reporter for the remainder of the quarter. Submissions received after the 15th of the month will be reviewed the following

month.

Quarter Dates:

- **Quarter One:** January, February, March
- **Quarter Two:** April, May, June
- **Quarter Three:** July, August, September
- **Quarter Four:** October, November, December

All submitted advertisements are subject to acceptance at the sole discretion of the CSTC. If an advertisement is not accepted, a refund will be issued.

[CLICK HERE](#) to submit your classified ad!



Unethical Minds

Wednesday, October 7, 2026

10:00 AM – 12:00 PM Pacific

2 Hours of Ethics CE

About the Webinar: You never know who around you might be an UNSUB – Unethical Subject. Join the UBAU – Unethical Behavior Analysis Unit as we profile some of the most egregious ethics violations and explore the pitfalls that can lead otherwise ethical preparers astray.

Using Circular 230 as our guide, we'll examine the ethical standards that govern tax professionals, with an emphasis on education, due diligence, and conflicts of interest. We'll work through cases ranging from questionable behavior to criminal conduct and discuss how tax professionals can recognize and appropriately respond to ethical issues.

[CLICK HERE](#) to learn more and register

EDD Audits: What Triggers Them, How They Work, and How to Protect Your Clients Before Year-End

Wednesday, October 21, 2026

10:00 AM – 12:00 PM Pacific

2 California CE Hours

About the Webinar: EDD audits can create significant challenges for businesses and their advisors, especially when clients are not prepared for the process. Understanding what attracts the Employment Development Department's attention – and what

happens after an audit begins — can help tax professionals better guide their clients and identify potential issues before they become larger problems.

Join Allison Soares for a practical look at common EDD audit triggers, how an audit progresses from the initial notice through assessment, potential personal liability for owners and officers, and important steps businesses should consider before year-end reporting begins.

[CLICK HERE](#) to learn more and register

Using the Augusta Rule and Hiring Your Kids

Wednesday, October 28, 2026

10:00 AM – 12:00 PM Pacific

2 Hours of Federal Tax CE

About the Webinar: This two-part webinar is designed for Enrolled Agents, CPAs, and tax professionals who want to move beyond tax preparation and provide proactive planning strategies to their clients.

Join Phuc Ly, EA for a practical look at two valuable strategies for business owners: properly implementing the Augusta Rule and legally hiring their children. The focus is not simply on understanding the rules, but on creating repeatable processes that can be implemented, documented, explained to clients, and maintained throughout the year.

[CLICK HERE](#) to learn more and register

Upcoming CSTC Chapter Events

October 5, 2026

Ethics and Due Diligence

Orange County - South Chapter Virtual Meeting

2 Ethics hour(s) (Topics meeting the ethics requirements under Cir 230)

[Click here](#) to learn more and register.

October 6, 2026

Estates and Trusts

San Diego - East County Chapter In-Person Meeting

2 Federal Law hour(s) (Topics covering existing tax law)

[Click here](#) to learn more and register.

October 7, 2026

Audits

Temecula Valley Chapter In-Person Meeting

2 Federal Law hour(s) (Topics covering existing tax law)

[Click here](#) to learn more and register.

California Tax Updates

San Francisco Bay Chapter Virtual Meeting

2 California hour(s) (Topics covering California law issues)

[Click here](#) to learn more and register.

October 8, 2026

Planning Ahead: Navigating Tax Audits, Estate Planning, and Business Succession

North County San Diego Chapter In-Person Meeting

2 Federal Law hour(s) (Topics covering existing tax law)

[Click here](#) to learn more and register.

October 14, 2026

Terrifying Tales of the Tax Court

Orange County Chapter In-Person Meeting

2 Federal Law hour(s) (Topics covering existing tax law)

[Click here](#) to learn more and register.

October 21, 2026

Common Strategies for Helping Clients with Tax Debts: Nonfilers, Bankruptcy, and Penalties

Inland Empire Chapter Virtual Meeting

2 Federal Law hour(s) (Topics covering existing tax law)

[Click here](#) to learn more and register.

October 22, 2026

CA Update 2026

San Diego Chapter In-Person Meeting

2 California hour(s) (Topics covering California law issues)

[Click here](#) to learn more and register.

October 27, 2026

Back to the Basis - Two-Part Event

Central Valley Chapter In-Person Meeting

Part One: 4 Federal Law hour(s) (Topics covering existing tax law)

Part Two: 2 California hour(s) (Topics covering California law issues)

[Click here](#) to learn more and register.

October 28, 2026

Planning for Business Owners: Considerations and Conversations

North County San Diego Chapter In-Person Social Event

NO CE OFFERED FOR THIS EVENT

[Click here](#) to learn more and register.

[Click here](#) to view the CSTC calendar

Welcome New CSTC Members!

Helva Bendik

San Jose Chapter

Ely Ronald Farol

San Diego Chapter

Neeru Goswami
San Diego-North County Chapter

Patrick Roman
Temecula Valley Chapter

Nawshaba Siddiky
San Diego-North County Chapter

Jayni Wong-Placencia
Central Valley Chapter



Legislative Advocacy

CSTC has been the leading Association in supporting legislation to provide protection for our profession, to support our profession, and to enhance our profession. CSTC continuously leads our industry through legislative advocacy, educational opportunities, and professional inclusion.

CSTC works closely with a Legislative Consultant to keep an eye on important bills that would affect taxpayers and small business owners.

[Please click](#) here to view the bills that CSTC is currently monitoring.



[IRS announces new relief for eligible taxpayers affected by ongoing events in Israel: due dates for eligible returns and payments may be postponed to Sept. 30, 2027; additional relief may be available](#)

IR-2026-116, Sept. 30, 2026 — The IRS announced today that due to the ongoing conflict in Israel, the agency is providing additional tax relief to affected individuals and businesses, postponing until Sept. 30, 2027, a wide range of deadlines for filing

federal returns, making tax payments and performing other time-sensitive tax-related actions.

[Treasury, IRS issue proposed regulations on installment payments for tax on certain farmland sales](#)

IR-2026-115, Sept. 28, 2026 — The Department of the Treasury and the Internal Revenue Service today issued proposed regulations for taxpayers who sell or exchange qualifying farmland to qualified farmers and elect to pay the tax on the gain in four equal annual installments.

[IRS launches new mobile app, expanding digital services for taxpayers](#)

IR-2026-114, Sept. 25, 2026 — The IRS today announced the launch of the new IRS mobile app, replacing IRS2Go and expanding the agency's digital services to give taxpayers more ways to securely access IRS tools and account services from their mobile devices.

[IRS wraps up successful Nationwide Tax Forums with nearly 13,000 attendees](#)

IR-2026-113, Sept. 21, 2026 — The Internal Revenue Service last week wrapped up the fifth and final 2026 Tax Forum in San Diego with nearly 13,000 attending the five forums where tax professionals participated in workshops and seminars and received one-on-one assistance with taxpayer cases.

[IRS warns of tax credit scams targeting the tribal community](#)

IR-2026-112, Sept. 18, 2026 — The Internal Revenue Service today warned taxpayers, tribal communities, businesses and tax professionals about promoters selling fake "Tribal Tax Credits" that do not exist under federal law.

[Security Summit closes summer series with data security reminder for tax pros](#)

IR-2026-111, Sept. 16, 2026 — The Internal Revenue Service and the Security Summit partners today urged tax professionals to stay vigilant against identity theft.

[IRS announces extension of tax relief for farmers and ranchers affected by drought in 49 states, other regions](#)

IR-2026-110, Sept. 15, 2026 — The Internal Revenue Service today issued guidance that provides an extension of tax relief for farmers and ranchers in most states and other regions who sold or exchanged livestock because of drought conditions.

[IRS reminder: Direct Pay offers free, easy way to pay taxes](#)

IR-2026-109, Sept. 10, 2026 — The Internal Revenue Service today reminded taxpayers who have bank accounts that Direct Pay offers a free, secure way to pay federal taxes directly from a checking or savings account.

[IRS issues notice on 45Z Clean Fuel Production Tax Credit to support domestic biofuel production and American agriculture](#)

IR-2026-108, Sept. 8, 2026 — The Internal Revenue Service today issued guidance on the Section 45Z Clean Fuels Production Tax Credit to empower America's crop and livestock farmers, ranchers, and fuel producers across the country and help them access the growing domestic biofuels market in a way that makes the Clean Fuels Production Credit work for them.

[IRS accepting applicants for 2027 Compliance Assurance Process](#)

IR-2026-107, Sept. 8, 2026 — The IRS today announced the opening of the application period for the 2027 Compliance Assurance Process (CAP) program for corporations. Applications will be accepted until Oct. 30, 2026.

[Security Summit: Strengthen defenses against tax identity theft](#)

IR-2026-106, Sept. 4, 2026 — The Internal Revenue Service and the Security Summit today urged tax professionals and taxpayers to strengthen defenses against tax-related identity theft.

[IRS reminder: National Payroll Week is time for a paycheck checkup](#)

IR-2026-105, Sept. 4, 2026 – The Internal Revenue Service today encouraged workers and employers to review withholding and payroll tax responsibilities ahead of National Payroll Week.

[IRS Reminder: Disaster preparedness starts with tax records](#)

IR-2026-104, Sept. 3, 2026 – The Internal Revenue Service today encouraged taxpayers to protect important tax and financial records before disaster strikes.

[Treasury, IRS Move to End Tax-Exempt Status for Discriminatory Practices in Private Schools](#)

IR-2026-103, Sep. 3, 2026 – The Department of the Treasury and the Internal Revenue Service (IRS) have issued proposed regulations to end federal tax-exempt status for private schools that engage in racial discrimination, delivering on President Trump's Executive Orders ending discrimination and restoring merit-based opportunity.

[News release and fact sheet archive](#)

Find previous year news releases and fact sheets from 1997 through last month.

Join the California Society of Tax Consultants!

[Click here to fill out an online application.](#)

CSTC advances professionalism within the tax industry by:

- Providing quality education
 - Creating networking opportunities
 - Advocating professional standards
-

CSTC Member Benefits

Our greatest Member benefits are the relationships you will build with other Members



The CSTC Member Listserv is an email address that forwards your email message to all who subscribe.

The CSTC Listserv is a great way to communicate quickly and easily with the subscribed members regarding business-related questions and requests for assistance.



CSTC members have access to benefits such as free payroll processing services for your tax practice, and the opportunity to earn new revenue through their flexible partnership options.

Introducing a New CSTC Member Benefit!

AskTomG.AI

Ethical research the way Tom teaches it.

Take your tax research to the next level with AskTomG.AI, a research platform built specifically for tax professionals by Thomas A. Gorczynski, EA, USTCP, and Joshua Youngblood, EA, CRETS. Members receive guided, authority-based research, transparent source citations, a built-in tax research library, and

BRASS TAX
PRESENTATIONS

CSTC members receive \$30 off every live seminar and 8-hour on-demand webinar that Brass Tax offers every year! That means Tax Toolbox, Update, and the new Summer Seminar are all \$30 off! This new benefit rolls out just in time for discounts on the upcoming Tax Toolbox seminar starting September 16th in Orange County. The 2025 Toolbox focuses on tax planning and strategies for rentals and also includes 2 hours of Ethics.



While Verifyle Pro is no longer offered for free, your CSTC membership gives you the ability to subscribe to Verifyle Gold for just \$15 per month (32% off the retail price), or Verifyle Platinum for just \$22 per month (55% off the retail price).

THE TAX BOOK
Real Answers. Real Fast!

CSTC members receive the TaxBook WebLibrary at a special price. Other Member Benefits Include:

Savings on all Society Educational Events / Savings on Contact, Correspondence & Self Study Education / Savings with member specialty CSTC Connects (previously

A&T B ACCOUNTING & TAX
BROKERAGE

If you are interested in buying or selling a practice, contact us today! ATB is operated by Enrolled Agents ensuring a complete understanding of our profession. Please give us a call at (855) 428-2225 or visit us online at www.ATBCAL.com for more information and view our current listings. CA D 02824



Wolters Kluwer

Wolters Kluwer: Discounts on Tax, Accounting & Audit Resources, Software, Information & Services.



Office Depot has partnered with us to provide exclusive savings in-store and online, plus fantastic additional benefits. This program is all about providing preferred pricing to our clubs, and the savings extend to almost every item.

Savings include 20% to 55% off item office supply core list, 20% to 55% off retail on cleaning & break room items, 10% off branded; 20% off private brand ink & toner core list, Average 10% off retail on 200 technology core items, Free next-

automatically generated, time-stamped research memos to help document their analysis. Best of all, CSTC members receive 15% off their subscription along with a 24-hour free trial to explore the platform risk-free.

yellow Pages) list / Savings with E&O Insurance, plus specialty coverage relevant to your profession / Online CSTC Find-a-Tax Consultant search to help promote your business! / CSTC Member Listserv

day shipping on orders of \$50 or more, and SIGNIFICANT savings on copy & print. Become a CSTC member to sign up for our Office Depot Small Business Savings Program, administered by

THANK YOU TO THE 2026 SUMMER SYMPOSIUM SPONSORS AND EXHIBITORS

SILVER SPONSOR



ACCOUNTING & TAX
B R O K E R A G E

LANYARD SPONSOR



TOTE BAG INSERT



EXHIBITORS

CFS Tax
Software

CSTC
Membership

The Gorczynski
Group

The Internal
Revenue Service