



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

September 2026

In This Issue...

From the CSTC President • Save the Date for the 2027 Summer Symposium • Classified Ads - A CSTC Member Benefit • 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

Yeah, so time is moving much too fast for my liking, but I suppose there's nothing to be done about it but lean in. Was I planning to be done with extensions by now? Yes. Did I actually expect that to happen? Honestly, no. But a girl can dream, can't she?

If you, like me, find yourself staring down a towering stack of extensions, just know that it will be over soon enough and then it's nothing but blue skies until January. And by blue skies I of course mean the CTEC renewal deadline, Update seminar season, and the holidays.

Also on the horizon is the first CSTC election since our change back to the calendar year. Perhaps you've seen the tremendous fun that the board has and thought "you know, I'd like to have fun like that!" Or maybe you've looked at the work we're doing and thought "feh, I could do that better." Or possibly you just love this organization as much as I do and want to give back. Whatever the reason, if you've ever thought about getting involved at the Society level, this is the time! Watch your inbox for the call for nominations and throw your hat in the ring.

As we head into the last push of this tax season, remember that you have a whole support network surrounding you. Whether you need a sanity check on some crazy new scheme your client heard on TikTok, a second pair of eyes on a particularly tricky return, or just an escape from the office for an hour or two, the CSTC membership is here for you. We're all in this together.

Until next month, stay cool (for real! It's brutal out there).

Respectfully submitted,
Shannon Hall, President

SAVE THE DATE FOR THE 2027 SUMMER SYMPOSIUM!



CSTC Classified Ads - A Member Benefit



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!

Upcoming CSTC Chapter Events

September 1, 2026

A Practical Overview of Nonprofits

San Diego - East County Chapter Virtual Meeting

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

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

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

September 2, 2026

Bill & Ted's Most Excellent AI Ethics Adventure

San Francisco Bay Chapter Virtual Meeting

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

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

September 10, 2026

2026 California Tax Update: Individual & Business

North County San Diego Chapter In-Person Meeting

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

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

September 17, 2026

Mastering Financial Statements for Better Business Return

San Diego Chapter In-Person Workshop

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

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

September 22, 2026

California Updates

Central Valley Chapter Virtual Meeting

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

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

September 23, 2026

California Tax Update

Inland Empire Chapter In-Person Meeting

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

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

September 28, 2026

Form 1041, U.S. Income Tax Return for Estates and Trusts and Form 541

Orange County - South Chapter Virtual Meeting

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

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

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

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

Welcome New CSTC Members!

Joan Cacali
Orange County- South Chapter

Oscar Garza Jr
Orange County Chapter

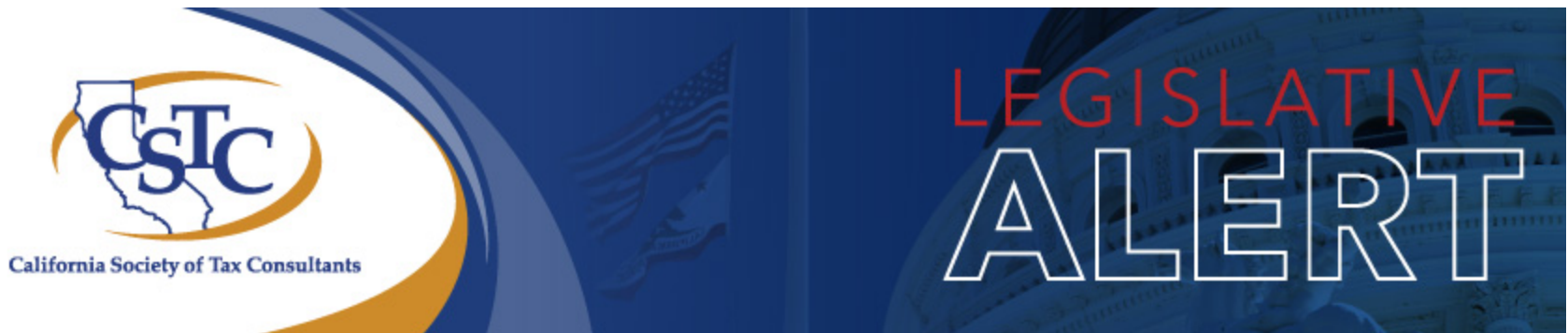
Annika Glaub
San Diego Chapter

Seila Herrera
San Diego-North County Chapter

Juan Sanchez
Greater Long Beach Chapter

Jeffrey Thompson
San Gabriel Valley Chapter

Eduardo Villegas
Greater Long Beach 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.



NEWS FROM THE IRS

[IRS online services spotlight: Taxpayers can get more done online](#)

IR-2026-102, Aug. 28, 2026 — The Internal Revenue Service today encouraged taxpayers to explore the growing number of IRS.gov online tools that can help them quickly and securely take care of common tax tasks.

[IRS reminder: Extension filers can use IRS Free File this summer](#)

IR-2026-101, Aug. 26, 2026 — The Internal Revenue Service today encouraged taxpayers who requested an extension to file their 2025 federal tax return as soon as possible, rather than waiting until the Oct. 15 deadline.

[IRS CEO meets with tax professionals at NY tax forum](#)

IR-2026-100, Aug. 25, 2026 — As part of the ongoing effort to engage with taxpayers and their representatives, Internal Revenue Service Chief Executive Officer Frank J. Bisignano last week met with New York-area stakeholders at the IRS Nationwide Tax Forum in New York City.

[IRS reminder: Information return e-file system transitioning to a new platform](#)

IR-2026-99, Aug. 24, 2026 — The Internal Revenue Service today reminded information return filers who currently use the Filing Information Returns Electronically (FIRE) system to prepare now for the system's retirement and transition to IRIS before the 2027 filing season.

[Interest rates remain the same for the fourth quarter of 2026](#)

IR-2026-98, Aug. 21, 2026 — The Internal Revenue Service today announced that interest rates will remain the same for the calendar quarter beginning Oct. 1, 2026.

[IRS launches digitally authenticated Tax Compliance Report](#)

IR-2026-97, Aug. 20, 2026 — The Internal Revenue Service today announced a digitally authenticated Tax Compliance Report available through IRS Individual Online Account.

[Treasury, IRS issue proposed regulations on eligible investments for Trump Accounts under the Working Families Tax Cuts](#)

IR-2026-96, Aug. 20, 2026 — The Department of the Treasury and the Internal Revenue Service today issued proposed regulations on eligible investments for Trump Accounts, a new type of traditional IRA under the Working Families Tax Cuts.

[IRS establishes Office of Conservation Easements and transitions settlement process](#)

IR-2026-95, Aug. 19, 2026 — Recognizing the important role conservation and historic preservation easements can play, as well as the specialized tax, valuation, contractual, and procedural issues they present, the Internal Revenue Service today announced the establishment of an Office of Conservation Easements.

[IRS updates FAQs about the limitation on the deduction for business interest expense](#)

IR-2026-94, Aug. 19, 2026 — The Internal Revenue Service today updated frequently asked questions about the limitation on the deduction for business interest expense.

[Treasury, IRS proposes rules to protect refundable tax credits from abuse by illegal aliens](#)

IR-2026-93, Aug. 19, 2026 — The Department of the Treasury and the Internal Revenue Service issued proposed regulations to apply and clarify the federal law regarding the eligibility requirements for taxpayer-funded refundable individual income tax credits.

[IRS, Security Summit remind tax pros they need a Written Information Security Plan to protect client data](#)

IR-2026-92, Aug. 18, 2026 — The Internal Revenue Service and Security Summit partners today reminded tax professionals to protect client data with a Written Information Security Plan.

[Treasury, IRS issue guidance on rollovers between retirement plans and individual retirement accounts](#)

IR-2026-91, Aug. 12, 2026 — The Department of the Treasury and the Internal Revenue Service today provided guidance to simplify and standardize the rollover process by issuing sample forms for direct rollovers to or from a retirement plan, as required under the SECURE 2.0 Act section 324.

[Treasury, IRS issue proposed regulations on employer contributions to Trump Accounts under the Working Families Tax Cuts](#)

IR-2026-90, Aug. 11, 2026 — The Department of the Treasury and the Internal Revenue Service today issued proposed regulations providing guidance to employers that choose to make contributions to Trump Accounts for employees or their dependents.

[Treasury, IRS begin implementing Executive Order 14403 by announcing intent to issue proposed regulations on Saver's Match, which will benefit millions of low- and moderate-income taxpayers](#)

IR-2026-89, Aug. 7, 2026 — The Department of the Treasury and the Internal Revenue Service today issued Notice 2026-48 announcing an intent to propose regulations regarding the federal Saver's Match program, which begins in 2027.

[IRS updates FAQs on qualified overtime deduction](#)

IR-2026-88, Aug. 6, 2026 — The Internal Revenue Service today updated frequently asked questions about the deductions for qualified overtime compensation.

[Business Tax Account gives eligible taxpayers more secure, convenient ways to manage federal tax obligations online](#)

IR-2026-87, Aug. 6, 2026 — The Internal Revenue Service today announced new and expanded features for Business Tax Account (BTA) users, giving eligible businesses and organizations more ways to view digital notices, make payments, and access and manage federal tax account information online.

[Treasury, IRS Issue Guidance on the Permanent Expansion of Paid Family and Medical Leave under the Working Families Tax Cuts](#)

IR-2026-86, Aug. 5, 2026 — The Department of the Treasury and the Internal Revenue Service (IRS) issued Notice 2026-28, providing guidance on the employer credit for paid family and medical leave (PFML) under the Working Families Tax Cuts (WFTC).

[Security Summit warns tax pros to watch out for phishing emails and other attacks](#)

IR-2026-85, Aug. 4, 2026 — The Internal Revenue Service and Security Summit partners today warned tax professionals to watch for phishing emails and other schemes designed to steal sensitive taxpayer data.

[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
-

FOLLOW CSTC ON SOCIAL MEDIA!

Two solid gray squares are positioned at the bottom left and bottom right corners of the page, serving as decorative elements.



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!



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



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).



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



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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.

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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

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