



California Society  
of Tax Consultants

# CSTC *Reporter* e-Newsletter

CSTC Newsletter

September 2025

## In This Issue...

From the CSTC President • Call for Presenters for the 2026 Summer Symposium • Classified Ads - A Member Benefit • Upcoming Wednesday Webinars • Upcoming Chapter Events • Welcome New CSTC Members • Legislative Advocacy • News from the IRS • Join CSTC! • CSTC Member Benefits • Thank You to our 2025 Summer Symposium Sponsors and Exhibitors • Follow CSTC on Social Media!

---

## From the CSTC President



Can you feel it? It's in the (very humid) air.

Somehow it's September, and since Disneyland saw fit to launch their "Halloween Time" seasonal festivities on August 22nd, I think I can officially say that spooky season has begun! It's my very favorite time of year.

And what a year it's been so far! We've had one of the biggest tax changes of the current decade in the form of OB3, and now it looks like California is ready to give us a new conformity date. It would be cool if it was the same date as the enactment of OB3 wouldn't it?

But where's the fun in that?

From what we can tell, we'll likely have conformity to federal law as of January 1, 2025, with some notable exceptions, which means that we can't retire the trusty 38 page Schedule CA just yet (yes, I know it's only 6 pages, but hyperbole is fun).

Speaking of California tax, for all my CTEC preparers out there, this is a great time to be thinking about how many hours you have for the year (though if you joined us at Summer Symposium you should be covered). If you're missing hours, be sure to check out the calendar on our website to see what educational offerings are coming up in your area, and you never know, some might even be spooky! We also have some fantastic offerings in our Wednesday Webinar series, so watch your inbox for updates.

Don't wait until you're handing out candy to trick-or-treaters to realize you're missing your two hours of Ethics or one or two CA hours for the year. Now THAT would be scary!

Remember, as pumpkin spice returns with a vengeance and we're staring down the extended deadlines, find time to do the things you love with the people that you love.

We're almost to the end, and at the end of this crazy race there's candy and pie.

Stay cool, my friends.

Shannon Hall  
President

---



**Call for 2026 Summer Symposium Presenters**

The California Society of Tax Consultants (CSTC) provides quality tax education for tax professionals, including CTEC-registered preparers, Enrolled Agents, CPAs and attorneys. CSTC's premier education event is the Summer Tax Symposium.

The 2026 Symposium will be a live event held June 7-10, 2026, at the Silver Legacy Resort Casino in Reno, Nevada. CSTC is looking for speakers to share their tax knowledge and expertise with their peers and colleagues. Seminar sessions range from one to four-hour classes that provide attendees with information about the topic as well as practical applications they can put to use in their practices.

We are accepting submissions in all areas of taxation including:

- Current tax updates
- Individual tax
- Businesses
- Exempt Organizations
- Trusts and Estates
- California Tax
- Representation
- Tax Planning
- Other topics related to taxation

While this is a live event, there will be a webinar series to be held throughout the year, so please feel free to submit even if you prefer not to attend a live event and your submission will be considered for virtual events.

Please [CLICK HERE](#) to fill out the Call for Presenters Form in its entirety and submit it no later than **October 3, 2025 at 5 pm**. Only complete submissions will be considered.

Presenters are selected by the Education Committee based on recommendations and fit with the overall goal of the Symposium. **All submitters will be notified by October 30, 2025.**

If you have any questions, please contact the CSTC office by phone at 949-715-4192 or by email at [info@cstcsociety.org](mailto:info@cstcsociety.org).

CSTC Summer Symposium Committee  
[www.cstcsociety.org](http://www.cstcsociety.org)

**SAVE THE DATE FOR THE 2026 SUMMER SYMPOSIUM!**

**JUNE 7 - 10, 2026**  
**SILVER LEGACY RESORT CASINO**  
**RENO, NEVADA**

Engage with tax professionals, industry experts, and government leaders for three days of valuable insights, networking, and professional development. More details to come – mark your calendar!

---



## CSTC Classified Ads - A Member Benefit

---

### Looking to Buy Practice

Looking to purchase a tax practice in San Diego County with up to 100 clients, specializing in individual returns. I offer personalized service, a commitment to high-quality care, and am ready to assist with a smooth transition for retirement.

Contact me if you're ready to sell at [Susan@taxwisepros.com](mailto:Susan@taxwisepros.com) or 9257861490

### Practice for Sale

Self-employment opportunity for San Diego area resident to work in La Mesa office. Partial transfer of long-established practice to serious tax professional. Minimum 5 years heavy intermediately complex experience. Use Pro-Series. Buyer's resume to Patricia Maison-Godfrey at [patricia@taxladyonline.com](mailto:patricia@taxladyonline.com) or call 619.697.2852.

### Help Wanted

Full-Charge Bookkeeper needed (onsite in San Diego). Min. 5 yrs exp in accounting office required. Must know QB Desktop & Online (QBOA), MS Office. Duties: Bookkeeping, tax forms, organized, strong communication skills. Not remote/training. Email resume to Lisa Lindgren at [lisa@lindgrenfs.com](mailto:lisa@lindgrenfs.com) if qualified.

### Help Wanted

BOOKKEEPER/RECEPTIONIST - Established El Cajon Tax and Bookkeeping Service seeking a, detail-oriented, and reliable bookkeeper. 25-30 hrs per wk with 40 hrs per wk during tax season. Must have phone skills and knowledge of Quickbooks, Excel, Word, P/R and sales tax. Will train on tax software. Contact Daniel Carr at 619-442-9602 or [dcarr23886@aol.com](mailto:dcarr23886@aol.com) for more information.

---

### 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 Wednesday Webinars

### Wednesday, September 3, 2025

EDD Worker Classification Audits

10:00 AM to 12:00 PM PST

Cost: Member: \$40 / Non-Member: \$70

Presenter(s): Sally Reddy, J.D., LL.M. and Brandon Burger, J.D., LL.M

[CLICK HERE](#) TO LEARN MORE AND REGISTER!

### Wednesday, September 17, 2025

Tax Savings for Real Estate Professionals & Grouping Elections

10:00 AM to 12:00 PM PST

Cost: Member: \$40 / Non-Member: \$70

Presenter(s): Jane Ryder, EA, CPA

[CLICK HERE](#) TO LEARN MORE AND REGISTER!

### **Wednesday, September 24, 2025**

Rental Real Estate Advanced Tax Issues and Sale or Foreclosure

10:00 AM to 12:00 PM PST

Cost: Member: \$40 / Non-Member: \$70

Presenter(s): Jane Ryder, EA, CPA

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

[CLICK HERE](#) TO LEARN MORE AND REGISTER!

---

## **Upcoming CSTC Chapter Events**

### **September 3, 2025**

Dissolution: Closing a Business Entity from a Federal Tax Perspective

San Gabriel 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

Temecula Valley Chapter In-Person Meeting

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

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

### **September 9, 2025**

Short Term Rentals-Schedule C or Schedule E

San Diego - East County Chapter Virtual Meeting

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

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

### **September 10, 2025**

Ethics and the Basics of Circular 230

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.

Retirement Tax Playbook: Navigating Key Tax Changes & Opportunities

Orange County Chapter In-Person Meeting

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

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

### **September 11, 2025**

2025 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 16, 2025**

Death, Taxes, and Property: Planning Ahead for Your Clients  
Sacramento Chapter In-Person Meeting  
2 Federal Law hour(s) (Topics covering existing tax law)  
[Click here](#) to learn more and register.

### **September 17, 2025**

California Tax Updates  
Inland Empire Chapter Virtual Meeting  
2 California hour(s) (Topics covering California law issues)  
[Click here](#) to learn more and register.

### **September 22, 2025**

Business Tax Boot Camp- Schedule C Sole Prep  
Orange County - South Chapter Virtual Meeting  
2 Federal Tax Update hour(s) (Topics covering new tax law)  
[Click here](#) to learn more and register

### **September 23, 2025**

Two-Part Meeting: California Tax Updates and How to Report Sales from 1031 Exchange and Bases of Inherited Property  
Central Valley Chapter Virtual Meeting  
Part One: 4 California hour(s) (Topics covering California law issues)  
Part Two: 2 Federal Law hour(s) (Topics covering existing tax law)  
[Click here](#) to learn more and register

### **September 24, 2025**

Taking the Mystery out of Medicare  
San Jose Chapter Virtual Meeting  
2 Federal Law hour(s) (Topics covering existing tax law)  
[Click here](#) to learn more and register.

Hit A Homerun with Your California State Update  
Greater Long Beach Chapter In-Person Meeting  
2 California hour(s) (Topics covering California law issues)  
[Click here](#) to learn more and register.

Business Tax Boot Camp - Partnerships  
Orange County - South Chapter Virtual Meeting  
2 Federal Law hour(s) (Topics covering existing tax law)  
[Click here](#) to learn more and register.

## **September 25, 2025**

The One, Big, Beautiful Bill Act  
San Jose Chapter Virtual Meeting  
2 Federal Tax Update hour(s) (Topics covering new tax law)  
[Click here](#) to learn more and register.

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

---

## **Welcome New CSTC Members!**

**Yonas Adhanom**  
**Central Valley Chapter and Sacramento Chapter**

**Diane Bradshaw**  
**San Diego Chapter**

**Kathleen Chipp Tinker**  
**San Diego Chapter**

**Riki Donaghyt**  
**Central Valley Chapter**

**Grazyna Kazak**  
**Orange County Chapter**

**Emiko Keymeulen**  
**San Gabriel Valley Chapter**

**Terry Kim**  
**Los Angeles Chapter**

**Maria Munoz**  
**San Jose Chapter**

**Nancy Palomera**  
**Inland Empire Chapter**

**James Quade**  
**Orange County- South Chapter**

**Hector Vargas**

Orange County Chapter

Stacey Watson

Greater Long Beach Chapter

Michelle Wehrli

Orange County- South Chapter

---



## LEGISLATIVE ALERT

### 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

### [Security Summit: IRS reminds tax pros to guard against identity theft as summer series wraps up](#)

IR-2025-88, Aug. 26, 2025 — The Internal Revenue Service and the Security Summit partners are closing out the fifth and final week of the “Protect Your Clients; Protect Yourself” awareness series by reminding tax professionals to stay vigilant and strengthen safeguards to protect against identity theft.

## [Interest rates remain the same for the fourth quarter of 2025](#)

IR-2025-87, Aug. 25, 2025 — The Internal Revenue Service today announced that interest rates will remain the same for the calendar quarter beginning Oct. 1, 2025.

## [Treasury, IRS issue FAQs to address the accelerated termination of several energy provisions under OBBB](#)

IR-2025-86, Aug. 21, 2025 — The Internal Revenue Service today issued frequently asked questions (FAQs) in Fact Sheet 2025-05 relating to the modification of sections 25C, 25D, 25E, 30C, 30D, 45L, 45W, and 179D under the One, Big, Beautiful Bill Act (OBBB). Please provide a preview link when available.

## [IRS asks for public input on free tax filing options to inform congressional report](#)

IR-2025-85, Aug. 21, 2025 — The IRS invites the public to participate in an anonymous feedback survey on tax preparation and filing options, which will run through Sept. 5, 2025.

## [IRS accepting applicants for 2026 Compliance Assurance Process](#)

IR-2025-84, Aug. 18, 2025 — The Internal Revenue Service today announced the opening of the 2026 Compliance Assurance Process (CAP) program application period, which will run from Sept. 3 to Oct. 31, 2025.

## [Security Summit: Protect against tax identity theft with multi-factor IDs, Identity Protection PINs, IRS Online Accounts](#)

IR-2025-83, Aug. 12, 2025 — In the fourth installment of a special summer series, the Security Summit partners today remind tax professionals and taxpayers about the IRS Identity Protection PIN and the IRS Online Accounts that can help protect against tax-related identity theft.

## [IRS announces no changes to individual information returns or withholding tables for 2025 under the One, Big, Beautiful Bill Act](#)

IR-2025-82, Aug. 7, 2025 — The IRS today announced that, as part of its phased implementation of the One, Big, Beautiful Bill Act, there will be no changes to certain information returns or withholding tables for Tax Year 2025 related to the new law.

## [IRS reminds employers: Educational Assistance Programs can help pay employee student loans through 2025](#)

IR-2025-81, Aug. 6, 2025 — The Internal Revenue Service today issued a reminder that employers can continue to use educational assistance programs to help employees pay down student loans through December 31, 2025.

### [IRS Nationwide Tax Forum standard rate deadline approaching for Orlando and Baltimore](#)

IR-2025-80, Aug. 5, 2025 — The Internal Revenue Service reminded tax professionals that space is filling up quickly for the remaining 2025 IRS Nationwide Tax Forum events. The Chicago, New Orleans and San Diego forums sold out, and the IRS encourages those planning to attend in Orlando or Baltimore to register before the standard rate deadlines.

### [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.



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



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 Consultants (previously 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



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](http://www.ATBCAL.com) for more information and to view our current listings. CA DRE 02002824



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).



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-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 Excelerate America.

**FOLLOW CSTC ON SOCIAL MEDIA!**

THANK YOU TO THE 2025 SUMMER SYMPOSIUM SPONSORS AND EXHIBITORS

SILVER SPONSOR



BRONZE SPONSOR



BADGE SPONSOR



LUNCH & LEARN



AUDIT LOUNGE: AI AFTER DARK



EXHIBITOR RECEPTION (SPECIALTY DRINK)



CONFERENCE TOTE BAG INSERT



EXHIBITORS

