



California Society
of Tax Consultants

CSTC *Reporter* e-Newsletter

CSTC Newsletter

April 2025

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From the CSTC President

Ah, April.

The time when my seasonal eye-twitch decides to make its annual appearance and I start welcoming new grey hairs and naming them after my clients. This is also the time when I start dreaming about all the luxuries I have to look forward to on the other side of the 15th. You know, things like haircuts and dental appointments.

This is also the time when I look longingly out my office window and daydream about tropical cocktails with umbrellas in them. As I tried to wrack my already wracked brain for something to share with you this month, I decided to share the recipe for one of my favorite umbrella drinks; one which, conveniently, has a pretty appropriate name for this time of year: the Painkiller. If you don't imbibe, don't fret; for my teetotaling friends there is a booze-free option that tastes just as good (I promise).

I invite you to shut down your computer a bit earlier than normal one evening and shake up one of these refreshing (and dangerous) libations. Kick up your feet and imagine the sound of the waves gently lapping at the shore just off in the distance, on a beautiful island where there is no new tax legislation coming at us this year. Put some Martin Denny or Les Baxter on the Spotify and escape, even if it's just for an hour to two.

The Painkiller

Ingredients:

- 2 ounces Pusser's Rum (Pusser's actually has this trademarked, so you can use a different rum, but you'd be breaking the law).
- 4 ounces pineapple juice

- 1 ounce orange juice
- 1 ounce cream of coconut
- Freshly ground nutmeg (you can use pre-ground, but that would be cheating)

Directions:

- Add ingredients (not the nutmeg) to a cocktail shaker and shake vigorously. Shake out all that tax-season stress.
- Pour into a glass or goblet filled with ice.
- Grate fresh nutmeg on top (or sprinkle the pre-grated stuff)
- Garnish with an orange slice and a cherry, preferably with an umbrella.
- Relax and enjoy!

If you want to omit the rum, simply swap it with 2 ounces of coconut water.

I hope this helps to alleviate some of your tax season pain. Stay strong, friends. We're in the homestretch.

I look forward to celebrating with you and I hope to see you all at our Summer Symposium in June.

Shannon Hall
President



REGISTRATION IS OPEN FOR THE 2025 SUMMER SYMPOSIUM!

JUNE 8 - 11, 2025

SILVER LEGACY RESORT CASINO

RENO, NEVADA

The California Society of Tax Consultants, Inc. (CSTC) has been a nonprofit organization dedicated to supporting tax professionals across California since 1966 (formerly known as ISTC). CSTC is committed to providing high-quality education and exclusive member benefits. Whether you're a bookkeeper, accountant, CRTP, Enrolled Agent, or CPA, CSTC has something valuable to offer.

Our programs cover a wide range of tax topics, all approved for CTEC, EA, and CPA credit. Did you know you can earn *all* your CTEC credits for the year at the Symposium? That’s right—federal, update, ethics, and California hours, all in one event!

And guess what? The popular Lunch and Learn sessions are back! Your registration includes both breakfast and lunch each day of the event.

With an outstanding lineup of speakers and topics, there’s something for everyone, whether you’re a beginner or a seasoned tax preparer.

We can’t wait to see you in Reno! The CSTC Summer Tax Symposium is an event you won’t want to miss!

CLICK HERE TO LEARN MORE AND REGISTER!

Summer-Symposium Schedule-at-a-Glance

	Sunday, June 8, 2025
3:00 PM to 5:00 PM	Registration Open; Exhibitor Set-up
5:00 PM to 6:00 PM	Welcome Reception for First-Time Attendees
6:00 PM to 7:00 PM	Welcome Reception (light appetizers will be served) This event is family-friendly. (Included with full registration. Guest registration is \$95)
	Monday, June 9, 2025
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	IRS Breakfast Keynote Session Speaker: TBA
9:15 AM to 10:05 AM	Breakout Sessions:
	Track One: Breaking Down the Brokerage Statement Speaker: Shannon Hall, EA

	Track Two: Countdown to 2026 - Advising Estate Planning Clients Today! Speaker: Frank Acuña, Attorney at Law
	Track Three: Disaster Casualty Losses: Tax Implications Speaker: Jane Ryder, EA, CPA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: Mastering the Tax Research Process: Analyzing Tax Authority Speaker: Tom Gorczynski, EA, USTCP
	Track Two: Intro to Representation Speaker: Josh Youngblood, EA
	Track Three: IRS Criminal Investigations for Non-Attorney Practitioners Speaker: LG Brooks, EA, CTRS
12:00 PM to 1:20 PM	<i>Lunch and Learn: More information to come!</i>
1:20 PM to 3:00 PM	Breakout Sessions:
	Track One: Mastering the Tax Research Process: Practical Applications Speaker: Tom Gorczynski, EA, USTCP
	Track Two: 1031 Exchanges Speaker: Ryan Reichert, EA, CFP
	Track Three: Improving Data Security through Strategic Client Communications Speaker: Brad Messner, EA
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Individual Tax Update Speaker: Tom Gorczynski, EA, USTCP

5:00 PM to 6:30 PM	Reception with Exhibitors
	<u>Tuesday, June 10, 2025</u>
7:00 AM to 5:00 PM	Registration and Exhibits
7:30 AM to 9:00 AM	Franchise Tax Board Breakfast Keynote Session 2025 California Tax Updates Speaker: TBA
9:15 AM to 10:05 AM	Breakout Sessions:
	Track One: The Power of the Research & Development Credit: Case Studies Speaker: Brad Messner, EA
	Track Two: Community Property Law Speaker: LG Brooks, EA, CTRS
	Track Three: Reconciling Clean Vehicle Credits - <u>Session Title Change</u> Speaker: Josh Youngblood, EA
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: The Gig Is Up: Handling Income in Unique Industries Speaker: Brad Messner, EA and Matt Metras, EA
	Track Two: Hit a Home Run With Your California Tax Update Speaker: Patty Barron, EA
	Track Three: Successful Audits for Individuals, Rentals & Business Speaker: Jane Ryder, EA, CPA
12:00 PM to 1:20 PM	2025 Annual Business Meeting and Awards Ceremony Luncheon (Included with registration)
1:20 PM to 3:00 PM	Breakout Sessions:

	Track One: Tax Quest: The Ultimate Year-End Tax Planning Adventure Speaker: David Hilliard, EA, NTPI Fellow
	Track Two: California Property Tax Update Speaker: Frank Acuña, Attorney at Law
	Track Three: Intro to: FBAR, FATCA, and FinCEN Speaker: Claudia Stanley, CPA, EA
3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: Business Tax Update Speaker: Ryan Reichert, EA, CFP
	<u>Wednesday, June 11, 2025</u>
7:00 AM to 5:00 PM	Registration and Exhibits
8:20 AM to 10:05 AM	Breakfast Keynote Session: Tax Stuff You Thought You Knew Speaker: Shannon Hall, EA and Ryan Reichert, EA, CFP
10:05 AM to 10:20 AM	Coffee Break / Break with Exhibitors
10:20 AM to 12:00 PM	Breakout Sessions:
	Track One: Retirement Tax Playbook: Navigating Key Tax Changes and Opportunities Speaker: David Hilliard, EA, NTPI Fellow
	Track Two: Digital Assets 101 Speaker: Matt Metras, EA
	Track Three: Fundamentals of Business Tax Balance Sheets Speaker: Jane Ryder, EA, CPA
12:00 PM to 1:20 PM	<i>Lunch and Learn: More information to come!</i>
1:20 PM to 3:00 PM	General Session Stump the Tax Experts Speaker: Speaker Panel

3:00 PM to 3:20 PM	Break with Exhibitors
3:20 PM to 5:00 PM	General Session: 10 Commandments for Your Practice: Ethics Speaker: Claudia Stanley, CPA, EA
5:15 PM	Grand Prize Drawing

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

New Member Resource - Classified Ads!

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

April 1, 2025

Tax Breakfast Meeting
North County San Diego Chapter In-Person Meeting
1 Federal Law hour (Topics covering existing tax law)
[Click here](#) to learn more and register.

April 6, 2025

Round-Table Discussion 2024 Tax Return Issues/Resolutions
Greater Long Beach Chapter In-Person Meeting
3 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

April 8, 2025

Tax Breakfast Meeting
North County San Diego Chapter In-Person Meeting
1 Federal Law hour (Topics covering existing tax law)
[Click here](#) to learn more and register.

April 11, 2025

Round Table
Temecula Valley Chapter In-Person Meeting
1 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

April 23, 2025

Oh, no! Somebody Stole My Identity!
Wine Country Chapter In-Person Meeting
2 Federal Law hour(s) (Topics covering existing tax law)
[Click here](#) to learn more and register.

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

Welcome New CSTC Members!

Susan Alefi
San Diego Chapter

Deborah Botello
Greater Long Beach Chapter

Mario Carmona
Los Angeles Chapter

Patricia Claproth
Inland Empire Chapter

Magali Flores Rivera
Greater Long Beach Chapter

Iryna Khrystenko
San Diego-North County Chapter

Rita Lavelle
Sacramento Chapter

Tika Timsina
San Diego 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

[Earned Income Tax Credit celebrates 50 years of helping working families](#)

IR-2025-38, March 28, 2025 — The Earned Income Tax Credit has played a crucial role in helping millions of low-to-moderate income workers out of poverty. Saturday, March 29, 2025, marks the 50th anniversary of this important credit.

[IRS: Free File provides quick and easy way to file taxes](#)

IR-2025-37, March 25, 2025 — As the end of tax season approaches, the Internal Revenue Service reminds taxpayers that IRS Free File is a quick and easy way to file federal tax returns for free.

[Follow key filing guidelines to speed refunds, avoid errors](#)

IR-2025-36, March 24, 2025 — The Internal Revenue Service issued a series of tips and reminders to speed taxpayer refunds and avoid errors on their federal tax returns as the April 15 filing deadline approaches.

[IRS-CI names Gary Shapley as deputy chief](#)

IR-2025-35, March 19, 2025 — Gary Shapley has been named deputy chief for IRS Criminal Investigation (IRS-CI), starting March 19. In his new role, Shapley will oversee 20 field offices and 14 foreign posts, including more than 2,000 special agents investigating tax fraud and other financial crimes.

[IRS: West Virginia storm victims qualify for tax relief; various deadlines postponed to Nov. 3](#)

IR-2025-34, March 14, 2025 — The Internal Revenue Service announced today tax relief for individuals and businesses in parts of West Virginia affected by severe storms, straight-line winds, flooding, landslides and mudslides that began on Feb. 15, 2025.

[IRS reminds retirees: April 1 final day to begin required withdrawals from IRAs and 401\(k\)s](#)

IR-2025-33, March 13, 2025 — The Internal Revenue Service issued a reminder today that in most cases retirees who turned 73 in 2024 must begin receiving payments from Individual Retirement Arrangements (IRAs), 401(k)s and similar workplace retirement plans by Tuesday, April 1, 2025.

[Tax Time Guide: Use IRS electronic payment options for fast, safe service; avoid penalties and interest](#)

IR-2025-32, March 12, 2025 — The Internal Revenue Service today encouraged taxpayers to file a tax return or pay taxes they owe using electronic options on IRS.gov by April 15.

[Taxpayers should act now to claim more than \\$1 billion in refunds for tax year 2021 with the April 15 deadline fast approaching](#)

IR-2025-31, March 11, 2025 — The Internal Revenue Service announced today that over 1.1 million people across the nation have unclaimed refunds for tax year 2021 but face an April 15 deadline to submit their tax returns.

[**IRS: Don't overlook free options for preparing and filing taxes in 2025; Direct File available in 25 states**](#)

IR-2025-30, March 10, 2025 — The IRS encouraged taxpayers who have yet to prepare and file their tax returns to consider taking advantage of the many free options available – including Direct File, a free, fast and easy way to file directly with the IRS, now available in 25 states.

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

IR-2025-29, March 6, 2025 — The Internal Revenue Service today announced interest rates will remain the same for the calendar quarter beginning April 1, 2025.

[**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 subscribers and 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 Connects (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 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 Exceleerate America.

FOLLOW CSTC ON SOCIAL MEDIA!

THANK YOU TO OUR 2024 SYMPOSIUM SPONSORS



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