



California Society of Tax Consultants
Inland Empire Chapter

CALIFORNIA SOCIETY OF TAX CONSULTANTS

CSTC—Inland Empire Chapter



Tax Year 2019 Update Workshop
Saturday, January 4, 2020
7:30 a.m. to 4:30 p.m.



LOCATION MAP ON PAGE 2



Federal Update — Speaker: Claudia Stanley, CPA, EA

4 hours Federal Update IRS Program #: 18QC1-U-01305-19-I, 2 hours Ethics 18QC1-E-01306-19-I; CTEC #: 1000-CE-4691

Federal Update (4 hours): The course will cover the Federal changes for individuals and businesses impacting the 2020 filing season. The topics will include form changes, tax court cases, rulings and other IRS changes for 2019. The materials will have the latest amounts and limits for various deductions and credits. We'll also look at the latest guidance on the 199A deduction, disaster areas for 2019, new forms, and how to assist your clients with completing the new W-4's for 2020.

Conducting Effective Tax Interview (2 hours): The course will cover the basics of conducting effective interviews with taxpayers before preparing their tax return. Knowing the right questions to ask facilitates gathering the right information for an accurate return and weeds out clients with questionable data. The better you know your client, the better prepared you'll be to address their various life situations impacted by tax, such as retirement, starting a business, deductions credit impacting their dependents, and much more. Together we'll look at ways to read between the lines to get to the facts you need.



Claudia Stanley is a practicing CPA & EA in the Fresno area, as partner in C. Stanley, CPA & Associates. She is a graduate of California State University, Fresno, and serves on the boards of the Central California Chapter of Enrolled Agents and Fresno chapter of American Business Women's Association. Claudia is a long-time member the Central Valley Chapter of California Society of Tax Consultants and was named their 2016 member of the year. She was also named one of 2001 Top Ten Women of the Year in the nation by American Business Women's Association. She frequently speaks on various tax topics.

California Update—Speaker: Lila Fedler, EA—FTB Taxpayers' Rights Advocate's Office

2 hours CA Update—CTEC # 1000-CE-4691 (EAs NO credit)

Topics to be addressed during the CA Update are: Taxpayers' Rights Advocate's Office; Current issues: Legislation— Bills of Interest, Conformity; Earned Income Credit (EITC), Audit Issues, Collection Topics; Tax Appeals and Assistance Program (TAAP), Website Redesign; Communicate with the FTB.



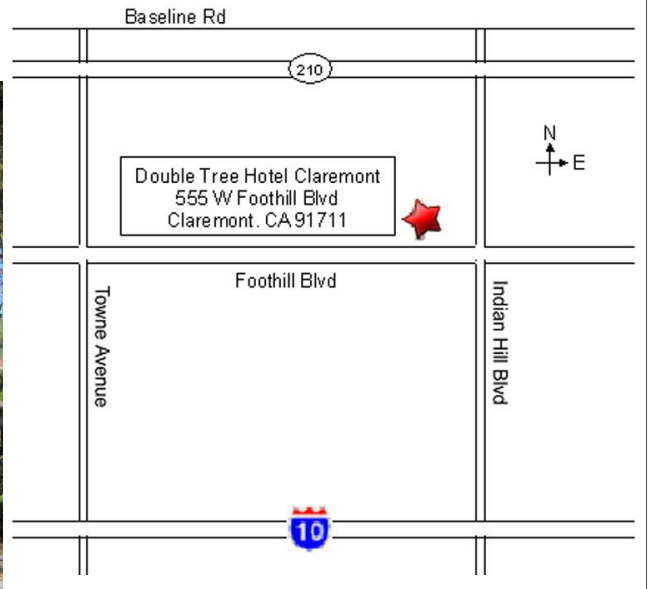
Lila Fedler is a Franchise Tax Board spokesperson and serves as a Technical Assistant to the Advocate. Lila is an Enrolled Agent with the Internal Revenue Service, and began her career with the Franchise Tax Board in 1980. Lila currently works directly with the Taxpayer Rights' Advocate to assure that the taxpayers have been afforded the protections of the Taxpayers' Bill of Rights. With her more than 37 years, Lila has acquired a broad range of experience covering both personal income and corporation tax laws. In addition to her experience as a Franchise Tax Board Auditor, Protest Hearing Officer, and Audit Technical Specialist and Reviewer, she worked in the private sector as Senior Manager in the state and local tax practice at a top public accounting firm, headquartered in the West, providing consulting services to public and private middle-market enterprises in many different industries.

These presentations (4 hours Federal Update, 2 hours Ethics, 2 hours CA Update credit) have been designed to meet the requirements of the Director of Practice of the Internal Revenue Service; the California State Board of Accountancy; and the California Tax Education Council including code 31 of Federal Regulations 10.6 (g). This does not constitute an endorsement by these groups. A listing of additional requirements to renew tax preparer registration may be obtained by contacting CTEC at PO Box 2890, Sacramento, CA 95812-2890, or phone CTEC at (877) 850-2832, or on the Internet at www.ctec.org.

Registration form on page 2

Workshop Location

DoubleTree Hotel Claremont
555 W Foothill Blvd, Claremont, CA 91711



Early Registration

including payment must be postmarked no later than EXTENDED TO 12/27/2019

Member: \$175
Non-Member: \$225

Your registration fee includes continental breakfast, lunch, snacks & handouts. Parking is free.

4 hours Federal Update, 2 hours Ethics
2 hours CA credit (EAs **no** CA credit)

Late Registration

ALL registrations including payment postmarked after 12/27/2019 will be:

\$240

CANCELLATION POLICY: Full refund less \$10 if requested by 12/28/2019. **NO refund if requested after 12/28/2019**

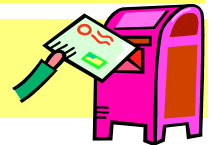
For more information contact: Frank Medrano (Chair), phone 909.237.1040, email: TaxPrep4every1@gmail.com

Please make your check payable to: California Society of Tax Consultants

Note: Telephone Registration no longer accepted.

Register early & save!

Mail to: CSTC c/o Duberly Beck—Beck's Tax & Business Services
17087 Orange Way, Ste B, Fontana, CA 92335



(PLEASE PRINT)

Tax Year 2019 Update Workshop

When: January 4, 2020—Where: DoubleTree Hotel Claremont

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We suggest bringing a jacket or sweater as room temperature varies.