



CALIFORNIA REPUBLIC

**February Dinner Meeting
California Tax Update**

PRESIDENT'S MESSAGE by David Hilliard, EA

February is the month we recognize all the past presidents who have severed this organization over the years. It is only right that we take a moment to thank them for their service. As I come to the final months of my 2 terms, the found respect for this position is enormous. I recommend that you start your path to this position, you will come away with some treasured experiences. Being able to tell your children "That's President Dad" is priceless. Even if a presidency term is not in your cards, take the time and volunteer. You get out what you put in.



Also, this month you will be seeing the future board that will take over and build this organization. There are some new and familiar faces. They have taken a big step to helping all our members. It is important they have your support and assistance. I invite you to offer your help, you will have a friend to help you sometime as well.

Finally, We all lost a friend earlier this year. Vicki Mulak was an icon to this chapter and organization. There has already been so much greatness said about her life, she truly was a gracious a patient mentor. I never had the chance to properly thank her for all that advice she gave me. She never expected anything in return, it was simply Vicki being Vicki. Thank Vicki, you will be missed... Good luck this tax season, we are here to help.

Got Badge?



Are you a member that has not received your OCCSEA name badge yet? Contact Edwin Young to order yours. edwin@youngstaxnfinancial.com Then pick it up at a future dinner meeting and start building a professional relationship with us.



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of the California Society
of Enrolled Agents

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FEBRUARY DINNER MEETING

California Tax Update



The seminar will present changes in CA tax codes that have come into effect and look at the upcoming changes brought on by the 2017 tax cuts and jobs act. A look at the tax code that does and does not conform to federal tax code will be discussed. Look at the 2019 tax filing season for CA.

LEARNING OBJECTIVES:

1. CA TAX UPDATE FOR 2019 TAX YEAR
2. CA TAX CODES CONFORMING / NON CONFORMING TO FEDERAL
3. WHAT'S NEW for 2020



Speaker: Lynn "Ms. California Tax" Freer is President of Spidell Publishing, Inc.® She works closely with all state tax agencies and is often consulted for input on policy decisions. She always has the inside information on what's happening at the state level because she devotes herself full time to analyzing, writing about, and teaching California tax law and procedures. Lynn speaks at Spidell's annual Federal and California Tax Update Seminars as well as many other seminars.

Payment via mail-in form is check only.

Tuesday, Feb 18 2020

4:15 Board Meeting
5:30 Social and Networking
6:00 Dinner Served
6:40 Presentation
8:20 Conclusion

1 HR CPE State Credit

\$40 Member, \$50 NonMember
before midnight on the Thursday
prior to meeting.
\$45 Member, \$55 NonMember
at the door

**CLICK HERE
TO REGISTER**



Phoenix Club

1340 S Sanderson Ave, Anaheim, CA 92806

Online Registration: www.eaoc.org.

Contact reservations@eaoc.org if you have difficulties registering.

Course materials, when available, can be downloaded via a link provided in the registration confirmation email sent to each participant.

All cancellations must be submitted to Reservations@eaoc.org or Treasurer@eaoc.org prior to the start of the event. For Education Events (excluding SEE Class): A 20% cancellation fee will be applied, and all remaining fees paid will be refunded. To avoid the cancellation fee, the fee paid may, instead, be credited towards another OCCSEA Education event given within the next 6 months. For SEE Class: A \$100 cancellation fee will be applied, and all remaining fees paid will be refunded. For Dinner Meetings: OCCSEA does not refund fees for dinner meetings. However, if an emergency arises and you notify the chapter at Reservations@eaoc.org or Treasurer@eaoc.org prior to the start of the event, a credit will be allowed for the next dinner meeting.



Practice Management Corner

by Louis Avalos, EA

The time has arrived its Superbowl season but more importantly it's the kickoff of the 2020 Tax Season. Once that Superbowl is done the clients will be running to the phones and making appointments so be ready to rumble its tax time.

When we renewed our pins we had to declare that we knew about cybersecurity and had a plan in place. The IRS has produced a basic checklist they call Tax Security 2.0. Its very basic but it covers all major points. I would not be surprised if your E&O provider ask for a copy of your plan before they write your policy. There is a Security Policy Template available – send me an email for a copy.

The Taxes-Security-Together Checklist The checklist includes:

- Deploy the “Security Six” measures
 - o Activate anti-virus software
 - o Use a firewall
 - o Opt for two-factor authentication when it's offered
 - o Use backup software/services
 - o Use drive encryption
 - o Create and secure Virtual Private Networks
- Create a data security plan
 - o Federal law requires all “professional tax preparers” to create and maintain an information security plan for client data

The requirement is flexible enough to fit any size of tax preparation, from small to large

- o Tax preparers are asked to focus on key areas such as employee management and training; information systems; and detecting and managing system failures.

- Educate yourself on phishing scams
 - o Learn about spear phishing emails
 - o Beware of ransomware
- Recognize the signs of client data theft
 - o Clients receive IRS letters about suspicious tax returns in their name
 - o More returns filed with your Electronic Filing Identification Number than you submitted
 - o Clients receive tax transcripts they did not request
- Create a data theft recovery plan
 - o Contact local IRS stakeholder liaison immediately
 - o Assist IRS in protecting clients
 - o Contract with cybersecurity expert to stop thefts



News from Continuing Education



Kim Mellinger-Cheng, EA Education Chair

Tax season is here again...I swear we just finished it. January was a hard a month for us losing Vicki Mulak. We will dearly miss her and her laugh at classes she taught. I attended her funeral and it warmed my heart to me to see other EA's travel from near and far to pay their respect. The friendships that have been built at our chapter and the other CSEA members are priceless.

In January, I was able to attend Jim Stern Day, which is CSEA's advocacy event. I have to say, if you have never done this before, do it next year. It was a wonderful experience to be in the capital and talk about tax law and how it affects each of us.

The Chapter will be going dark for the next 2 months; however, the education committee is still sailing the ship and putting together great classes for our return in May. The 2020 year is almost all planned out. Stay tuned for updates on the topics and speakers. A few of the speakers that will be teaching after we come up for air on April 16th will be Alan Pinck, Frank Acuna, Jane Ryder, Geri Bowman, Tom Gorczynski, and Karen Joyner.

Mark your calendars for Ethics in September taught by Tom Gorczynski. If you have a suggestion for the evening class with her, let me know. We have moved two of the dates for education due to conflicts with Super Seminars and Sept 15th due date. June's meeting will be held on June 23rd, and September's will be on September 22nd.

February will be our traditional dinner meeting honoring our past presidents and having Lynn Freer go over CA tax updates and will go over highlighted information to help make our tax season better.

As always, we are looking for more volunteers to assist with our operating education events. This includes set-up, Audio/Video, registration and assisting the presenters. If you want to become more involved and meet more professionals, please contact me at kim@nmtaxsolutions.com.



CLASSIFIEDS

PEASLY, ALDINGER, & O'BYMACHOW, a local Huntington Beach, CA CPA firm has an immediate opening for a full time staff accountant. We are seeking a candidate who will be a "good fit", being able to work side by side and mesh well with all members of our staff and be well accepted by our client base.

Our offices are located on Main Street in Huntington Beach, approximately 1-mile from the ocean. We maintain a professional yet casual environment in our offices. We provide accounting and auditing services to a variety of for-profit and not-for-profit companies and organizations, and for municipalities. In addition, we provide bookkeeping and income tax services to a diverse clientele.

This position includes the following responsibilities and functions:

- participating in the preparation of tax returns
- researching income tax law to determine appropriate treatment of transactions
- participating in the execution of compilation and preparation engagements
- participating in client bookkeeping services
- researching basic technical accounting issues
- performing administrative tasks as needed

We offer a competitive compensation and benefits package, based on experience.

Classifieds available for OCCSEA Members & associates to advertise items for sale or rent, want ads & employment opportunities. Ads run for 2 consecutive months free of charge (longer based on space available). Let us know when your ad is no longer needed). Email to ddabelstei@aol.com. Include your name & phone number or email.

Let's break down Dynamex and AB 5



Under AB 5, most workers are presumed to be employees. The implications are huge for both employers and employees because employers must now provide these newly classified workers with workers' compensation, paid sick leave, overtime — the list goes on.



For more information, visit:
www.caltax.com/ab5

AB 5: Who is an Independent Contractor?

On-Demand Webinar — Available by February 21

Presented by: Lynn Freer, EA, and Renée Rodda, J.D.

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John Rydell
(562) 425-0564
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Just 4 Fun



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If you've been planning to take the Enrolled Agent Exam, but something always prevents you from getting it done, then...

NOW IS THE TIME TO BECOME AN ENROLLED AGENT!
NEW! SACRAMENTO LOCATION ADDED FOR THIS YEAR!

EA Exam Boot Camp will help you...

- Focus on topics most often covered on the test
- Overcome your fear of taking tests
- Use study methods that improve retention
- Learn and understand more in less time
- Use memorization tips and tricks
- Test-taking techniques you need to be successful
- Small class size
- Intense instruction and immediate application
- Motivation to GET IT DONE!
- You don't have to spend hundreds of hours studying to pass!!!



No need to retain information for weeks or months!

- ✓ Attend 2 day Part 1 class, then take that part of the exam in the next few days.
- ✓ Complete Part 1 before moving on to Part 2.
- ✓ By the end of the summer, you will have passed all 3 parts and will be filing your Application for Enrollment!



Class was developed by Lisa Ihm, EA and will be taught by Ryan Reichert, EA, a dynamic speaker who presents information in a logical way that helps students retain what they've learned. He will make the class time interesting and give you the encouragement you need to know you can succeed!



Comments from past students include:

- "Your little tips and tricks and ways of explaining things (stories) were really good. And it was fun!"
- "It was your enthusiasm, thoroughness, and caring teaching style that really helped me pass the test."
- "Couldn't have done it without you. And I keep reminding classmates to use those tactics. They work!!!"

You choose your location for each part!

Part 1 – Individuals (2 days) 8:30 am – 4:30 pm

June 29-30 Las Vegas, NV

Mesquite Club, 702 E St. Louis Ave, Las Vegas, NV 89104

July 9-10 Orange County, CA (Disneyland area)

National University, 3390 Harbor Blvd, Costa Mesa, CA 92626

July 13-14 **NEW!** Sacramento area, CA

10901 Gold Center Drive, Rancho Cordova, CA 95670

July 16-17 San Diego, CA

National University, 9388 Lightwave Ave, 92123

Part 2 – Businesses (3 days) 8:30 am – 4:30 pm

July 29-31 Las Vegas, NV

Mesquite Club, 702 E St. Louis Ave, Las Vegas, NV 89104

August 5-7 Orange County, CA

National University, 3390 Harbor Blvd, Costa Mesa, CA 92626

August 10-12 **NEW!** Sacramento area, CA

10901 Gold Center Drive, Rancho Cordova, CA 95670

August 17-19 San Diego, CA

National University, 9388 Lightwave Ave, 92123

Part 3 - Representation, Practice & Procedures

(Recorded webinar you can view at your convenience)

Registration fees

Bundle price - \$999

Part 1 - \$449

Part 2 - \$599

Part 3 - \$299

Save \$150 off bundle if you register by April 16!
Enter coupon code **OCEA\$150off** to receive discount.

We will ship your book direct to you as soon as it is released (usually April), so you can start studying!

Register Now at www.BrassTax.com.

If you have questions, please contact:

Education@BrassTax.com or call (858)487-2553

UPCOMING PROGRAMS & EVENTS

<u>DATE</u>	<u>EVENT</u>	<u>CPE</u>	<u>SUBJECT</u>	<u>INSTRUCTOR</u>	<u>LOCATION</u>
Feb 18, 2020	Dinner Meeting	2	CA Tax Update	Lynn Freer	Phoenix Club
March	Dark				
April	Dark				
May	Afternoon Seminar 4		1065 Pen to Paper	Jane Ryder	Phoenix Club
May	Dinner Meeting	2	Representation after TCJA	Jane Ryder	Phoenix Club
June			TBA	Alan Pinck	Phoenix Club
July	Afternoon Seminar 4		Form 1041 - Under the Hood	Frank Acuna	Phoenix Club
July	Dinner Meeting	2	When a Loved One Has Died	Frank Acuna	Phoenix Club
Aug			TBA	Geri Bowman	Phoenix Club
Sept	Afternoon Seminar 4		Advanced Rental Issues	Tom Gorczynski	Phoenix Club
Sept	Dinner Meeting	2	Ethics!!	Tom Gorczynski	Phoenix Club
Oct			CA Update	Speaker TBA	Phoenix Club
Nov			TBA		Phoenix Club
Dec			Holiday Party!!	Speaker TBA	Phoenix Club

Dinner Menu For This Month

- Corned Beef and cabbage
- Paprika Roasted Chicken
- Fresh Mixed Green Salad with Choice of dressings
- German Potato Salad
- Roasted Red Potatoes
- Southwest Vegetables
- Rum cake
- Tiramisu Cake

For those who require a special meal please make your request when registering on line.

PROFESSIONAL EDUCATION - OCCSEA is the premier source for continuing professional education (CPE)! If you're interested in becoming a member, please print and fill out our [Membership Application](#). Our chapter is an approved CPE and CLE education provider through our chapter dinner meetings and seminars with the following: Internal Revenue Service (IRS), American Institute for CPAs (AICPA), California Bar Association - Taxation Section (CBA), and California Tax Education Council (CTEC).

The Vision of OCCSEA is to represent and serve the best interests of Enrolled Agents in Orange County.

The Mission of OCCSEA is to provide a supportive network to promote the professional, personal and educational growth, and enhanced community recognition of Enrolled Agents.