

April News Letter

From: OCCSEA <info@eaoc.org>

To: ddabelstei@aol.com

Date: Wed, Apr 26, 2023 8:17 pm



Presidents Message

President's Message – April 2023

Hi to All!

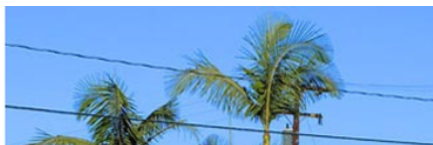
Cheers to another tax season half way completed. Each year since 2019, I feel tax season has become more challenging for most of us. During this season, at least for some of us, our software companies did not have tax forms ready and especially Ultratax releasing the form 8915F a few days before April 18th. We faced more challenges this season with the winter storms that pushed the deadline out. With more tax professionals retiring and our tax practices growing with more clients to serve, we all have been working long hours to complete their tax returns accurately and on time.

Despite these challenges, we play an essential role in helping individuals and businesses comply with tax laws and regulations and in helping them maximize their tax savings. We will celebrate our hard work with having an end of season get together at Availa's el Ranchito Mexican Restaurant.

We will be posting the upcoming summer classes at the dinner meeting in May. We will have a special guest in June, Leslie Cain EVP CSEA, will be attending our June dinner and providing an update on CSEA.

Kim Mellinger-Cheng, EA OCCSEA President

Upcoming Events





After Tax Party

Avila's El Ranchito (Santa Ana)

05/15/2023

5 pm - 9 pm

RSVP by 05/05 to Cecilia @714.505.6700



AFTER TAX PARTY 5 pm to 9 pm, May 15, 2023

Let's celebrate surviving another tax season!

Avila's El Ranchito Mexican Restaurant
2201 E 1st Street
Santa Ana, CA 92705

Hors D'oeuvres, pitchers of Margaritas, Beer, and Soft Drinks. Cost will be split amongst participants. (Feel free to open your own tab and order off the menu for yourself!)

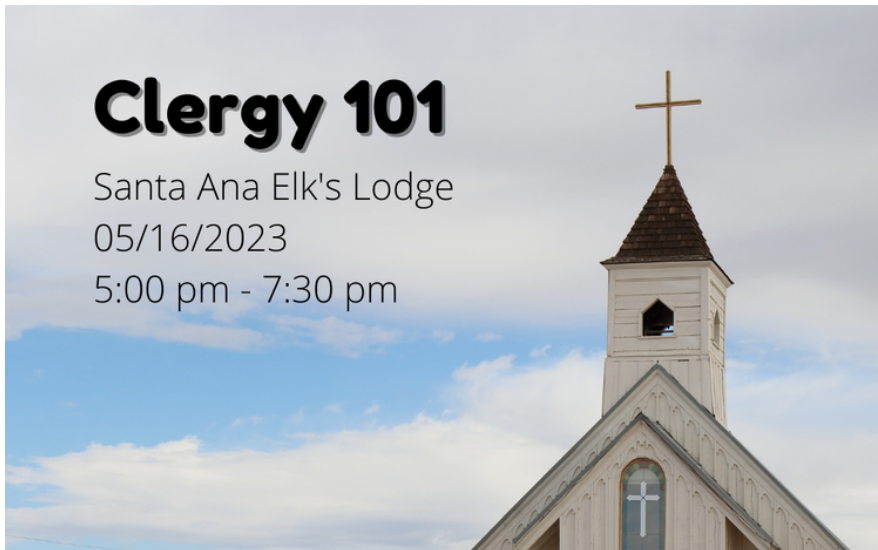
RSVP to Cecilia with BTI Professional Services (714.505.6700). **RSVPs are needed by 05/05/2023.**

Clergy 101

Santa Ana Elk's Lodge

05/16/2023

5:00 pm - 7:30 pm





Clergy 101 \$55 Member | \$65 Non-member

Members of the Clergy have a few benefits when it comes to tax planning, but are you aware of them? If a new client called you up, would you be comfortable taking them on as a client and walking them through the various laws that allow them to get the maximum benefit for tax purposes? In this 2-hour course, we will be going over the ins-and-outs of the Clergy's W-2, Housing Allowance and discussing the positives and negatives of Form 4361. Session led by Joe Davidson.

Tuesday, May 16, 2023

5:00 pm - 7:30 pm

Santa Ana Elk's Lodge
1751 South Lyon Street
Santa Ana, CA 92705

IRS: 2 Hours

CTEC: 2 Hours California Taxes

CA Bar: 1.75 Hours Taxation Law

3:30 pm - Board Meeting

4:30 pm - Social & Networking

5:00 pm - Dinner

5:30 pm - Session Starts

7:30 pm - Session Ends

Register through the CSEA website and register early so we have an accurate count for dinner. **Registration at the door fee is \$65 member and \$85 for non-member.**

[Register Now](#)





OCCSEA Board Retreat June 11 - 12, 2023

Mark your calendars for this year's OCCSEA Board Retreat! **RSVPs are needed by 05/12/2023.**

Temecula Creek Inn
44501 Rainbow Canyon Road
Temecula, CA 92592
951.694.1000

Educational Events - Summer 2023 Mark Your Calendar

We have great educational events coming up this summer! **Course-specific information pending. Save the following dates:**

Tuesday - June 27
Tuesday - July 18
Tuesday - August 15



Come join us for our first live board meeting - Click the image for details.

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