

July 2023 Newsletter

From: OCCSEA (info@eaoc.org)

To: ddabelstei@aol.com

Date: Wednesday, July 12, 2023 at 08:35 AM PDT



Presidents Message

President's Message – July 2023

Greetings!

Hopefully, everyone is enjoying their “lighter” workload during the summer break. At least not working the same long hours as we did from January till April in a normal tax season.

CSEA had a successful Super Seminar in June. During the conference we were all told of the new location for 2024, Arizona Grand Resort and Spa, Phoenix AZ. This location looks great and there will be amazing education. There is more information at www.CSEA.org.

We will be posting the upcoming summer classes on the website, www.eaoc.org. Our July 18th education topic will be on rental properties. This

is a 4-hour CE event. The first part will be a refresher on preparing the rental property tax return and then 2 hours of advance topic on rental properties. Also, we will be installing the board for 2023-2024 during our dinner so mark your calendar!

The CSEA Board of Directors Meeting is July 29th from 9 am - 5 pm. The Zoom link can be found on www.CSEA.org on the "Education/Events" tab and "Governance Meetings."

My family vacation this year was in Kitty Hawk, NC. We visited the Wright Brothers National Memorial. The brothers achieve the first successful airplane flight on December 17, 1903. Just over 100 years ago, the Outer Banks in North Carolina only had 60 people living in the area, and it was covered in white sandy dunes when the Wright Brothers took their first flight. The common message throughout the memorial is if you don't succeed the first time, keep trying till you do! Reading the story of the Wright Brothers made me think of the challenges we face in our practices and how we must keep going till we succeed. Lastly, we needed to be thankful for everyone in our lives who supported us when we worked crazy long hours and helped individuals with their tax needs.

Enjoy the rest of your summer and see you at the next meeting!

Kim Mellinger-Cheng, EA OCCSEA President

Claim Your Exclusive Discounts for Quickfinder & Taxbook Products!

- OCCSEA pays the Sales Tax!!
- OCCSEA pays for any freight costs!!
- OCCSEA has the books available for pickup at the January meeting, assuring you of having the material early in 2024.



**SAVE
MONEY**

Quickfinder & Taxbook Resources

As we work through the seemingly never ending 2022 filing season, it is almost time to order the tools to help you with the upcoming 2023 filings starting in early 2024.

Our chapter, with our volume ordering discounts, saves you money for these valuable resources in three ways:

- OCCSEA pays the Sales Tax!!
- OCCSEA pays for any freight costs!!
- OCCSEA has the books available for pickup at the January meeting, assuring you of having the material early in 2024

We have been able to offer ALL of the reference books offered by both publishers for the last several years at discounted prices. One of the options is to order the online versions:

- Quickfinder offers “ProView” versions of each of their books
- Taxbook offers a “Weblibrary” of ALL their books for one low price

Besides the convenience and search features, both of these on line options are available in late December giving you a running start on the 2024 season.

Final pricing for the 2023 editions are still being finalized; we expect to have the updated pricing sheets available at the August dinner meeting. They will also be sent out to all members via email.

One final point: rather than ordering now through the publishers and losing the use of your cash for several months, order through OCCSEA and we can hold the check until December if you wish.

Don't forget that OCCSEA gets a rebate for each book ordered through us so you not only save money but help your Chapter at the same time... Talk about a win-win!

If you have any questions, talk to Ken Blake at the next meeting or email him at kenblake@northpoint-wealth.com with any questions

Upcoming Events

REAL ESTATE 101 & MORE

7/18/2023; 3 pm - 7:30 pm

Member - \$119

Non-member - \$129

Price at door: Member - \$129; Non-member - \$139

REGISTER NOW

Santa Ana Elks Lodge

1751 South Lyon St

Santa Ana, CA 92705



IRS: 4 hours

CTEC: 4 Hours California Taxes

CA Bar: 3.5 Hours Taxation Law

Real Estate 101 & More

July 18, 2023

3 pm - 7:30 pm

Join us for a 4 hour CE presentation on Real Estate. In the complex world of tax law, there are two sides: the renter and the commissioner. In this course, attendees will explore the high stakes battle between these two entities as they navigate the murky waters of tax law. From analyzing case studies to dissecting relevant statutes, attendees will gain a comprehensive understanding of the tax system, how it impacts renters, and how a tax professional can help. With an emphasis on practical application, this course will prepare attendees to navigate tax law and order confidently, whether representing the renter or preparing their tax returns. The first part of the class will focus on how to build the schedule e return for basic rental return and then the second part of the class will review tougher issues with real estate.

IRS: 4 hours

CTEC: 4 hours California Taxes

CA Bar: 3.5 hours Taxation Law

Santa Ana Elks Lodge

1751 South Lyon St

Santa Ana, CA 92705

Schedule:

2 pm - Board Meeting

3 pm - Session 1 Starts

4:40 pm - Social & Networking

5 pm - Session 2 Starts with Dinner

7:30 - Session ends

Register through the CSEA website and register early so we have an accurate count for dinner. Registration at the door fee is \$129 member and \$139 for nonmember.

REGISTER NOW



SEE Class by Brass Tax Presentations

Part I - Individual

7/20-7/21; 8 am - 4:30 pm

Part II - Business

8/10-8/12; 8 am - 4:30 pm

REGISTER NOW

**Holiday Inn,
Orange County Airport**
2726 South Grand Ave
Santa Ana, CA 92705



SEE Class

Part I: July 20 & 21, 2023

Part II: August 10 - 12, 2023

8 am - 4:30 pm

The SEE class is back and is offering a compressed way to pass the Enrolled Agent exam. The class is part of the Brass Tax offering. The class will be held in two parts. Part one is for the individual and is on July 20 and 21 all day at the Holiday Inn of Orange County. Part two is for business and is on August 10, 11 and 12 at the same Holiday Inn.

This is an excellent way to enhance your skills or encourage CTEC or others to enhance their skills and learn about other opportunities for personal development. The class moves at a brisk pace but there is always room for questions. The instructor will encourage you to sign for your exam as soon as possible.

Holiday Inn, Orange County Airport
2726 South Grand Ave
Santa Ana, CA 92705

Parking is free.

If you have any questions or want to discuss the EA program please contact Louis Avalos at 949.322.9094.

REGISTER NOW

Educational Events - Summer & Fall 2023 Mark Your Calendar

We have more great educational events coming up this summer!

Tuesday - July 18th; Real Estate/Schedule E

Hosted by David Hillard, & Dan Dabelstein, EA

Tuesday - August 15th; IRS

IRS Liaison possibility to update on the latest IRS operations

Tuesday - September 19th; Ethics “Jeopardy Style”

Hosted by David Hillard, EA

Tuesday - October 17th; Practice Management, E-filing, Tax Document Management, Research Tools

Hosted by a panel

Tuesday - November 14th; Entity Choice



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

Our Sponsors



State Certified Residential
Real Estate Appraiser

- Appraising Residential Properties Since 1985
- Homes, Townhomes, Condos, 2-4 Units
- Expert Witness for Court
- Fees Starting From \$500.00



Contact
John Rydell
jrydell@aol.com
562-425-0564 - Office



San Juan Financial, 31726 Rancho Viejo St Ste 215, San Juan Capistrano, United States

Powered by [Squarespace](#)

[Unsubscribe](#)