

FW: June 2023 OCCSEA Newsletter

From: Kim Mellinger-Cheng (kim@nmtaxsolutions.com)

To: ddabelstei@aol.com

Date: Friday, June 16, 2023 at 11:14 AM PDT

From: OCCSEA <info@eaoc.org>

Sent: Wednesday, June 7, 2023 2:50 PM

To: Kim Mellinger-Cheng <kim@nmtaxsolutions.com>

Subject: June 2023 OCCSEA Newsletter

Presidents Message President's Message – June 2023 Hi to All! Hopefully everyone has a little bit of time for some well needed R&R. First, I would like to welcome all new members to the Orange County



Presidents Message

President's Message – June 2023

Hi to All!

Hopefully everyone has a little bit of time for some well needed R&R. First, I would like to welcome all new members to the Orange County Chapter. Second, our annual board retreat is this coming weekend. If anyone is interested in attending for the Sunday or Monday meeting, please let me know. It's a great way to get know the board and voice your ideas.

We will be posting the upcoming summer classes on the website, eaoc.org. We will have a special guest for our June 27 meeting, Leslie Cain EVP CSEA. Please attend and hear about all the great stuff going on in Sacramento for us. In July we will host an education event for rental property. It will be a 4 hour CE event. The first part will be refresher on how to prepare the rental property tax return and then 2 hours of advance topic on rental properties. Mark your calendar for July 18th.

I am in contact with our IRS Liaison regarding the ERC and the CP14 notices going to our clients. We have an update on ERC and once I hear back on CP14 notices, I will update the chapter.

Have a great summer (hopefully the sun finds it way to us) and see everyone at the education events.

Kim Mellinger-Cheng, EA OCCSEA President



IRS ALERT

The IRS has issued an alert to businesses and tax-exempt groups warning about signs for misleading Employee Retention scams. The ERC, sometimes also called the Employee Retention Tax Credit or ERTC, is a valuable credit for businesses and tax-exempt organizations that qualified for this pandemic-related credit in 2020 and 2021.

Claiming the ERC improperly could result in someone having to repay the credit, along with potential penalties and interest. We don't want this to happen to taxpayers!

Learn the signs and steps to avoid improperly filing claims involving misleading Employee Retention Credit scams.

[Learn More](#)

Upcoming Events



Super Seminar 2023
June 20 - 22, 2023
In Person & Online

Hosted by the [California Society of Enrolled Agents \(CSEA\)](#) for over 40 years, there is no better place for your professional development than Super Seminar. By attending, you'll gain the tools and resources you need to grow your tax practice and advance your career.

Comprehensive learning

With several tracks and numerous education sessions, Super Seminar offers complete education for tax professionals at every stage of their career. You'll be able to choose from a broad range of topics so you can customize the learning you need.

Fresh perspectives

Nationally renowned speakers offering fresh points of view and inspiring stories that can help shift your perspectives and deepen your understanding of taxation.

Endless solutions

Invest time with our exhibitors and sponsors - they are some of the best people for you to get to know if you want to learn more about what's happening in the world of taxes now - and what's going to happen in the future. Trust us: discovering innovative products and services is necessary to stay competitive in today's business world.

[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](#)



Board Retreat

TEMECULA CREEK INN



June 11-12, 2023

SUNDAY

Meeting: 10:00 am - 4:30 pm

Reception: 5:00 pm

MONDAY

Meeting: 9:00 am - 12:00 pm

REMINDER - Board Retreat June 11 - 12, 2023

We are looking forward to the 2023 retreat in a couple of weeks!

If you are only able to join for Sunday's meeting, please be sure to contact Dan Carlberg (djcarlberg@sbcglobal.net) so we can make sure the headcount is right for meals!

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!

Tuesday - June 27th, 4:30 pm; Santa Ana Elks Lodge

Leslie Cain from CSEA will be attending. Education event will be on "Steps For Paying IRS Debt". Registration link will be coming soon!

Tuesday - July 18th 2:00 pm; Santa Ana Elks Lodge

Tax and Rental Properties. 4 CE event, dinner will be served. More information to come!

Tuesday - August 15th; TBD

Tuesday - September 19th;

Ethics! More information to come!



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

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