

October Newsletter OCCSEA

From: OCCSEA (info@eaoc.org)

To: ddabelstei@aol.com

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Presidents Message

President's Message – October 2023

Greetings!

Welcome to the latest edition of our monthly newsletter!

September has come and gone and now its time to reach the finish line and wrap up the 2022 tax return! This year my office has told the clients that wait till the 11th hour that the “tax fairy” is not coming this year to save you. I am keeping this months message short and sweet since I have a very large pile of returns to process.

Reminder if you are a CTEC or have staff that are CTEC, October 31, is their renewal registration deadline. You have time to register for October education

dinner meeting on the the 24th for 2 more ce's in Federal Tax for ERTC Update.

Welcome new members to the chapter. We are glad you are here:

Lynn Meineke Amanda Han

Hope to see you at the October 24th dinner meeting.

Kim Mellinger-Cheng, EA OCCSEA President



A Comprehensive Guide to Launching a Business

Launching a business is an exciting endeavor, but it often comes with substantial financial challenges. If you're working with a tight budget, don't be discouraged. There are several strategic ways to start and grow a successful business without massive initial investment. This guide from [Orange County Society of Enrolled Agents](#) will provide you with practical tips on how to navigate this journey.

[Visit our latest blog](#) to read more on this topic!

**CS
EA** California Society of Enrolled Agents
Powering California's Tax Experts

October Update

California Society of Enrolled Agents News

What's CSEA been doing for the past ten months for 2023?

WITH LOUIS AVALOS, CSEA BOARD DIRECTOR FOR THE OC CHAPTER

News From Your State CSEA

The CSEA Board meeting was held on September 23, 2023. Here are some of the highlights from the meeting:

- Leslie Cain began the meeting reviewing the value of the Super Seminar which will be held in June 11-13 of 2024 at the Arizona Grand Hotel in Phoenix, AZ. The seminar offers 64 CEs of education and is available for review in the comfort of your office if attended online. For 2024 the location will be in Arizona offering a fresh location and many local activities. The seminar will include breakfast and lunch. More information to come very shortly.
- T Gordon had a strategic discussion where the topic was the local chapter. How can CSEA help the local chapter and add value to the meetings? The goal keeping members engaged is no small challenge further discussion is required.
- There is a large interest in practice management and how it applies to all stages of the career of a tax preparer. Ideas such as a roundtable the during the month would help to produce synergy for the members. One of the problems that chapters seem to be facing is that 50% of the members are in retirement mode whereas others are struggling to get started. These two groups need to meet and find common ground between them.
- The treasurer's report says the overall numbers are still not at pre-covid stage. More effort is needed to get back on track. An example of that is resuming live meetings.
- Education is working on a SOP for a Basic Tax Class lasting 10 weeks. This would be open to beginners as well as brand new people desiring to get into the field. The EA class is off to a softer start than the first, with 95 students having signed up for the class.
- Leadership development is working on a playbook to empower the chapters. This would provide a path on how membership can be increased as well as become more engaged in the chapter. This will be further developed in the next leadership meeting.
- F&B committee is reviewing a possible dues increase for 24-25 this is in discussion mode now. A task force has been established to discuss what to do with the building in Sacramento that is not being used. There

will be a presentation of the findings on 11/02/23 to see what options are available.

- The installation of new director David McKay, EA from Sacramento was installed.
- An update from C Leachmore from NAEA they have eliminated the 30 hrs CE requirement and the dual membership for NAEA/CSEA. Future impact is unknown, but it seems likely that that a clarification will be coming.
- Ending on a positive note, B Miller asked Chuck Rettig if more tax years could be e-Filed. His response was its coming maybe this year.

The next meeting is scheduled for January 6, 2024, and an update will be provided. Thanks for checking in with us!

Louis Avalos, MBA EA CSEA Board Director for the OC Chapter

Upcoming Events



OCTOBER SEMINAR

THE IRS EXPLAINS EMPLOYEE RETENTION TAX CREDIT



Our Guest Speaker

Susanne Guo

Tuesday, October 24

5:30 - 7:30 PM

Santa Ana Elks Lodge
1751 S Elk Ln
Santa Ana, CA 92705

October Educational Seminar: The IRS Explains ERTC

Join the Orange County Chapter of CSEA for an evening with Susanne Guo, Sr. Stakeholder Liaison Bilingual Tax Specialist with the Internal Revenue Service. Susanne will provide clear explanations, practical examples, and up-to-date information on the ERTC, equipping business owners with the knowledge to take full advantage of this valuable tax incentive.

Susanne Guo will cover all aspects of the ERTC, ensuring attendees have a solid understanding of how to leverage this credit effectively. Don't miss this

opportunity to hear directly from the IRS and gain valuable insights.

Tuesday - October 24th; 5:30 pm - 7:30 pm

Santa Ana Elks Lodge

1751 S Elk Ln

Santa Ana, CA 92705

- IRS: 2 Hours Ethics (Federal Tax Topics)
- CTEC: 2 Hours (Federal Tax Topics)
- CA Bar: 1.75 Hours (Taxation Law)
- CPA CA: 2 hours (Taxes)

Event Schedule

- 3:30 pm - Board Meeting
- 4:30 pm - Social & Networking
- 5:00 pm - Dinner
- 5:30 pm - Session Starts
- 7:30 pm - Session Ends

Registration

Register by 10/22 for Early Bird Rate:

- Member - \$59
- Non Member - \$70

Pricing for 10/23 and 10/24:

- Member - \$69
- Non Member - \$80

(Registration at the door is permitted but meals will be limited to availability if not pre-registered).

REGISTER NOW

Educational Events - Fall 2023 & Winter 2024

Mark Your Calendar

We have more great educational events coming up!

Tuesday - November 14th; Doing Well by Doing Good - Gift Tax

December - TBD Holiday Party

January 2024 - Jane Ryder - Quickfinder Update

February - FTB Update



Come join us for our boarding meeting at 3:30 on September 19th. We welcome all members to join the meeting.

Announcements



**WELCOME,
NEW MEMBERS!**

A Big Welcome to OCCSEA's Newest
Members!

Lynn Meineke Amanda Han



Ad Space Available

Looking for employees, office space, or even equipment for your business?
Place your ad here with us!

- FREE for members!
- Non-Members - \$25.00/month

If you have any questions or would like to place an ad, email Dan at ddabelstei@aol.com.

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

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