



SPECIAL NOTE--- QUICKFINDER ORDERS are now being collected at significantly reduced prices! You may place your order online or get a flat paper copy from our website.

The Tax Planning for Individuals Quickfinder with the new tax law info is available now if you wish..

[Click here to go to the Quick Finder online order form and webpage.](#)

hha Sctp newsletter keeps our members and colleagues up to date on important information. CIAL NOTE--- QUICKFINDER ORDE

SCTP has new classified ads posted this month. [Click here to view](#)

SCTP has added the **2018 Education Speaker list** to each issue of our newsletters for your convenience. View the list of speakers below.

Mark your calendars now for **January 9, 2019**-"2018 Year End Update", guest speaker, **Eugene Ostermiller, EA**. **More information coming soon**

August 8, 2018 Dinner meeting, Registration at 5:00 p.m., dinner at 5:30, speaker at 6:30

Speaker information and dinner menu below.

ALL Dinner Reservations must be paid by the Friday prior to the meeting.

Cost: \$35 for members, \$45 non-members and \$50 at the door

Location: Handlery Hotel, 950 Hotel Circle North, San Diego, CA 92108

Click the links below to use our Pay Online System to register for the monthly dinner meetings, renew or join Sctp membership.



**Monthly dinner meeting
registration online payment
center**

[Register now for the dinner meeting using our online pay system.](#)



**2018-2019 Membership
new/renewal.**

Become a member of SCTP or
renew your current membership
now.

[Click here to be directed to the
Membership Center.](#)

August 8, 2018

Speaker: Kevan McLaughlin

Topic: Expansion of Due Diligence requirements under § 6695(g) as a result of the 2015 PATH Act, Update on scope and application of 31 U.S.C. § 330 and Cir. 230. Discuss best practices to ensure compliance with applicable ethical requirements. Explore IRS return preparer projects and process for practitioner discipline.

2 hours: Ethics

IRS# M1NUJ-E-00060-18-I

CTEC # 6207-CE-0072



Kevan McLaughlin is an award winning San Diego tax attorney and adjunct professor of Ethics in Accounting at SDSU. Kevan represents taxpayers, and tax professionals, in disputes with the IRS, FTB, CDTFA, EDD, OTA, Department of Justice, and OPR. He has represented numerous taxpayers in audits, at trial before the U.S. Tax Court, and throughout various tax controversy matters. Kevan also has extensive experience in counseling tax professionals on best practices and defending them before the IRS and OPR.



Dinner Menu

Ceasar salad

Rolls and Butter

Chicken Piccata,

Parsley Potatoes,ken Piccata - Grilled Chicken Brea

Veget Sauce, Garlic and Parsley Potatoes

-or-

Chef's Choice Vegetarian Entree

Dessert

Brewed Coffee, Decaffeinated

Coffee and Tea

Iced Tea



AUGUST 2018 PRESIDENT'S LETTER

It is my pleasure to serve as the President of the Southern California Tax Professionals for the 2018-2019 year. As most of you know, I have served on the Board of Directors in various roles since the inception of SCTP, including as a Director and most recently Vice President, while also Chairing several committees along the way.

The goal of my Presidency will be to give the members of SCTP what they want. But in order to do that I need to hear from you. Please let me know what it is that you would like to see from SCTP. Whether that be new speakers, new topics, more meetings, less meetings, or lower fees (I actually already know the answer to the last one). I want to try and give you the education experience they desire, and then you guys will hopefully spread the word and we can drive our membership numbers even higher. So please let me know your thoughts. Speak to me at meetings, email me, or give me a call whenever an idea hits you.

We are also always looking for new faces on the Board of Directors, so if you have an inclination to serve on the Board please stop by one of our meetings. If a Board position sounds like more time than you have, you can also serve on a Committee without having to be a Board member. Our Committee chairs are always looking for additional help and would welcome your support.

For our August dinner meeting, we have Kevan McLaughlin speaking on Ethics. Everyone needs a little Ethics in their life, and also needs to satisfy their Ethics requirement each year. I have heard great things about Kevan as a speaker and am really looking forward to the presentation, and satisfying my Ethics requirement.

So here is to a great 2018-2019. Let's make this year a great one that we all enjoy and have a wonderful time...and maybe learn a little something about taxes along the way!

Respectfully,

Marc Lord

President

SCTP 2018 Education Speakers

[Visit our reservation center to sign up online](#)

August 8, 2018 – Kevan McLaughlin

Topic – 2 HRS- Ethics

Learn and discuss expansion of Due Diligence requirements under § 6695(g) as a result of the 2015 PATH Act.

Update on scope and application of 31 U.S.C. § 330 and Cir. 230.

Discuss best practices to ensure compliance with applicable ethical requirements.

Explore IRS return preparer projects and process for practitioner discipline.

September 12, 2018 – Wayne Otchis, CPA

Topic – 2 HRS- Tax Law, Current tax legislation & year-end tax planning

How are you dealing with Tax Reform?

Do you expect your practice to change?

How are you preparing for tax season?

Are you doing more tax planning than usual due to Tax Reform?

California Tax Reform Conformity?

October 10, 2018 - NO MEETING

November 14, 2018 – Mitchell B Dubick & Joshua Katz

December 12, 2018- Holiday Party – Fred Wollman, CFP, MPAS

Speaker – 1 hr

Topic - Retirement

January 9, 2019-"2018 Year End Update" Eugene Ostermiller, EA.

CTEC required hours

10 hrs- Federal Tax Law
3 hrs- Federal Tax Law Update
2 hrs- Ethics
5 hrs- California

Total of 20 hours

Meet the SCTP Board

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We have new classified ad's on our website. [Click here to view](#)



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