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## Public Awareness Campaign

Thanks to a mix of traditional media, social media, Internet news sources, and visual marketing efforts, California taxpayers are getting the message— **KNOW YOUR TAX PREPARER.**

### Outreach Efforts

For the 2015/2016 public awareness campaign, CTEC sent press releases to editors, reporters and producers statewide. CTEC secured a total of 44 media and blog reports.

CTEC is also partnering with Covered California to help educate registered tax preparers about the Affordable Care Act, as well as spread the message to Californians on how to choose a tax preparer.

### Strategies and Results

CTEC took an entirely different approach for the 2016 public awareness campaign. Most of the efforts focused on promoting a new microsite called [KnowYourTaxPreparer.org](http://KnowYourTaxPreparer.org).

The goal of the campaign was to...

- Strategically target California taxpayers who are considered at high risk for choosing an unregistered tax preparer.
- Make the message more

shareable through social media.

- Establish an easier method for taxpayers to find a California approved tax preparer.

The microsite is also available in Spanish and Mandarin.

Through the microsite, CTEC can better track the percentage of taxpayers who took action after seeing a CTEC advertisement, social media posts or media reports.

In addition to the microsite, the campaign spread the message through other visuals that are more conducive to channels like Facebook, Twitter and You Tube. CTEC launched two new animated You Tube videos and three infographics to help illustrate the message to California taxpayers.

Based on the campaign results, of the taxpayers who visited the microsite between January through April, approximately...

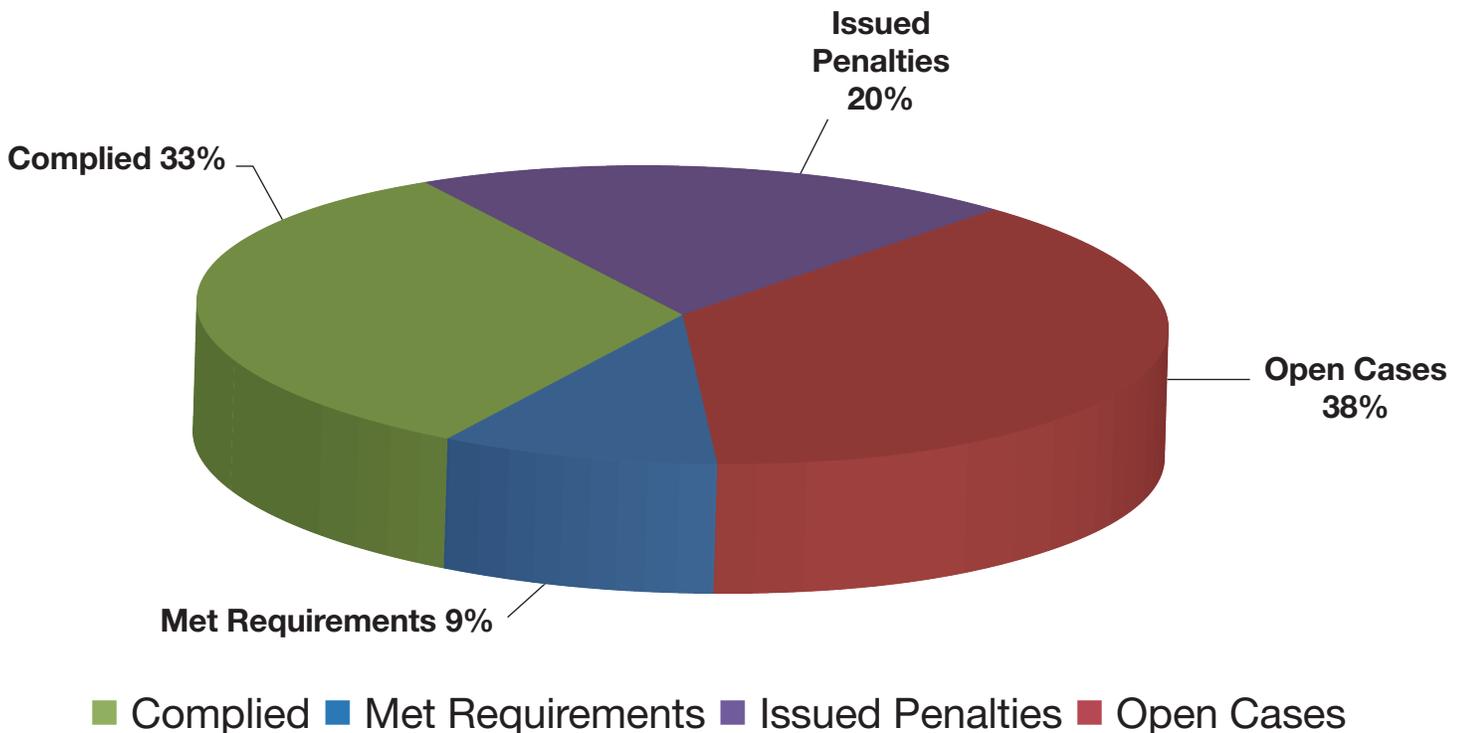
- 30% of visits were a result of CTEC billboards in Los Angeles and San Diego.
- 51% of visitors clicked on a CTEC Internet advertisement.
- 3% of visits were from a social media post.

# 2016 Tax Season Enforcement Results

As of April 22, 2016, the Franchise Tax Board (FTB) enforcement team identified 3,107 tax preparers as potentially unregistered. Of those, 1,906 cases are currently under review.

Unregistered tax preparers who are caught preparing, or assisting with preparing, tax returns for a fee will be issued a \$2,500 penalty letter from FTB. They have 90 days to register with CTEC before the penalty is enforced. If a tax preparer does not comply, the \$2,500 penalty is assessed. If a tax preparer still fails to comply the next year, a \$5,000 penalty will be issued.

To report an unregistered tax preparer, visit [ctec.org](http://ctec.org).



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- 16% of visits came from other outside sources, such as referrals, organic search results or media reports.

CTEC videos received more than 19,000 total views on YouTube, plus more than 20,000 views on Facebook and Twitter.

### Paid Advertising

The 2015/2016 paid advertising campaign focused on outdoor advertisements, print

advertisements, social media (Facebook, Twitter and YouTube) and Internet advertisements.

Billboards were displayed in Los Angeles and San Diego. CTEC advertisements were also printed in the Los Angeles World Journal to reach the Chinese Community.

The decision to advertise in those markets was based on enforcement reports from the Franchise Tax Board.

## Find CTEC



#CATaxEdCouncil  
#KnowYourTaxPreparer

**MARK YOUR CALENDAR!  
YOU ARE INVITED!**

**CTEC committee and board meetings are open to the public.**

November 17-18, 2016  
Santa Barbara, CA

Please call **877-850-CTEC** if you would like to attend

# IRS Nationwide Tax Forums

Registration is now open for the 2016 IRS Nationwide Tax Forums. CTEC will have a table at the California forum:

**San Diego  
Town and Country Resort  
September 13-15, 2016**

CTEC is scheduled to participate in a joint presentation with the Franchise Tax Board at the San Diego forum. The presentation will count for one state hour of continuing education. CTEC Registered Tax Preparers (CRTPs) who attend the forums can also earn up to 18 federal hours.

If you plan to attend, please remember to provide your CTEC number to the IRS when you register. If you do not give the IRS your CTEC number, you may not get credit for the courses you take.

Several weeks after the forum, the IRS will either mail or email your course completion certificate.

If you decide to skip San Diego and go to one of the other forums, you will have to submit a copy of the IRS completion certificate to CTEC and renew your registration by mail (one of the few exceptions to the CTEC online registration requirement).

This is an IRS event so please do not call CTEC with questions. For more information or to register, visit [irstaxforum.com](http://irstaxforum.com).

## Hotel Reservation Scam Alert

The IRS reports cases of housing companies making fraudulent claims that it is the official hotel reservation service for the 2016 IRS Nationwide Tax Forums.

These companies are NOT in any way affiliated with the IRS Tax Forums, the forum organizers or the forum hotels. The IRS advises all attendees to make hotel reservations at [irstaxforum.com](http://irstaxforum.com).

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## Welcome Our New Board Member

Esperanza Escobedo is a CTEC Registered Tax Preparer (CRTP). She specializes in individual and small business tax returns at a firm in Monterey County.

Esperanza plays a key role at Latino Tax Professionals Association where she helps research and develop tax-training materials for thousands of tax professionals across the nation.

In addition to being a CRTP, she is a Notary Public and is currently training to become a tax instructor. She lives in Soledad, California.



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## IRS Makes New Attempt to Regulate Tax Preparers

The IRS is moving forward with a proposal to require independent tax preparers meet federal education and licensing standards. The request was part of the FY2017 Budget proposed by President Obama in February.

The proposal is in response to a 2011 federal court ruling (*Loving v. IRS*), which said the IRS lacked statutory authority to regulate tax preparers. Part of the new proposal would give the Secretary of the Treasury explicit authority to regulate all paid tax preparers starting January 1, 2017.



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