



California Tax Education Council

News & Views

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New Legislative Changes to CTEC Requirements

California Assembly Bill 3143 was signed into law last year with new provisions and requirements that will extend the CTEC program until January 1, 2023. It was the third Sunset Review for CTEC since its inception 21 years ago.

22250*) stipulates revisions that will impact CTEC Registered Tax Preparers (CRTPs), as well as includes additional responsibilities for the Council.

*All references are in the California Business and Professions Code, Section 22250-22259"

The renamed Tax Preparation Act (Section

New 2019 Requirements

CRTPs Must Provide CTEC's Website to Clients

Effective **January 1, 2019**, CRTPs must provide the CTEC website, ctec.org, to clients in writing prior to rendering tax preparation services. This is in addition to other information already required — the tax preparer's name, address, phone number, plus bond company name and policy number.

CTEC Subject to Bagley-Keene Open Meeting Act

As of **January 1, 2019**, meetings of the CTEC Board of Directors are subject to the Bagley-Keene Open Meeting Act. This means that CTEC will now, among other requirements, be generally required to post meeting agendas at least ten days in advance of Board meetings and can only discuss or act on issues listed on the agenda.

Disciplinary Actions Against CRTPs Made Public

Starting **July 1, 2019**, CTEC will post on its website...

- All disciplinary actions taken against registrants by the Council, including – but not limited to – misconduct that results in a suspension or revocation of a CRTP registration.
- A list of registrants on probation, including the misconduct that resulted in the probation and any terms of probation.

Reporting Bond Claims

Starting July 1, 2019, a CRTP is required to report all paid claims against their surety bond to CTEC. CTEC is also required to post a notice of the paid surety bond claims on ctec.org.

New 2020 Requirements

Background Checks and Fingerprint Images – Begins July 1, 2020

California Business & Professions Code Section 22251.3* was amended to require **new applicants** interested in becoming CRTPs to pass a criminal background check and submit fingerprint images to CTEC to determine an individual's eligibility to register as a CRTP. The new requirements are NOT applicable to current CRTPs, only **new** applicants who register

beginning July 1, 2020.

Also beginning July 1, 2020, if a CRTP allows their CTEC registration to expire and they would like to reregister with CTEC, they not only will be required to retake the 60-hour qualifying education (QE) course, but they will

also be required to go through another background check and resubmit fingerprint images to CTEC.

Additional information regarding these new legislative requirements will be outlined in the August 2019 News & Views.

Welcome Our New CTEC Board Members

Stephen McMillen

Stephen McMillen is a CTEC Registered Tax Preparer. He is currently the CEO of Champion Income Tax in Palm Desert. He has been preparing tax returns and doing accounting for the past decade. Outside of tax season, Stephen spends his time working on and off stage at a non-profit theatre company, skydiving and oil painting.

agent representing the National Association of Tax Professionals (NATP). She has been with NATP since 1989 and is currently the Director of Research and Government Relations.

She has a Bachelor of Arts degree in liberal studies from the University of Wisconsin-Oshkosh.

Mark Your Calendar! You are Invited!

CTEC meetings are open to the public

May 22-23, 2019
Sacramento

November 14-15, 2019
San Francisco

Please call **877-850-2832** if you would like to attend.

Katie Zollo

Katie Zollo is a CTEC Registered Tax Preparer. She has been preparing tax returns for the past 10 years she has been working at a family operated Liberty Tax franchise in Ukiah. Katie enjoys the ocean, animals, painting and cooking.

Cindy Hockenberry

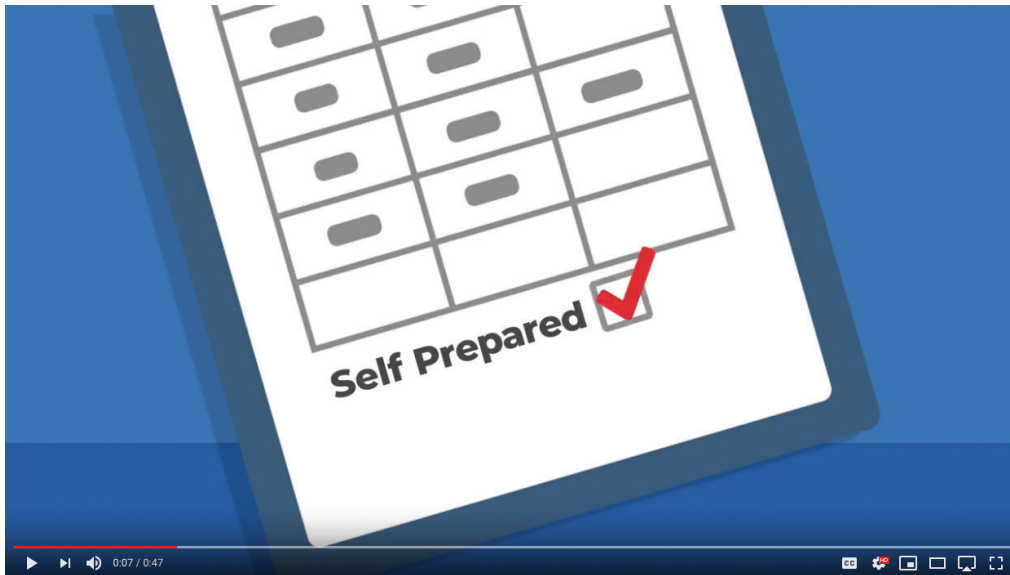
Cindy Hockenberry is an enrolled

Public Protection Still Highest Priority

According to the California State Legislature, protecting the public shall be the highest priority for CTEC. When protection of the public is inconsistent with other interests to be promoted, the protection of the public shall be paramount.

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Public Awareness Campaign Focuses on “Ghost Tax Preparers”

CTEC will continue to expand its endeavors to warn taxpayers about tax preparers who do not sign client tax returns, also known as “ghost tax preparers.” CTEC will launch a statewide media relations, Internet and social media campaign, as well as expand its outdoor advertising campaign to new markets.

Billboards will be posted in Los Angeles, San Diego, Bakersfield and Fresno. Bus shelter signs will also be posted in Los Angeles. All outdoor advertisements in each market will be posted in English and Spanish.

The decision to focus outdoor advertisements in the listed markets is based on enforcement reports from the California Franchise Tax Board (FTB).

In addition to the ghost tax preparer campaign, social media posts and Internet advertisements (English and Spanish) will run during the 2019 tax season educating taxpayers on how to find a California approved tax preparer.

Government Partners

CTEC partners with government organizations to help reach taxpayers and tax preparers regarding California requirements for professional tax preparation.

Internal Revenue Service

irs.gov

Tax Professional Information
irs.gov/taxprofessionals

AFSP Information
irs.gov/tax-professionals/annual-filing-season-program

Franchise Tax Board

ftb.ca.gov

Tax Professional Information
ftb.ca.gov/professionals

Tax News Subscriptions
ftb.ca.gov/professionals/taxnews

Covered California

coveredca.com

1095 Information
coveredca.com/members/form-1095-a

Find Local Help
coveredca.com/get-help/local

Special Enrollment Period Information
coveredca.com/individuals-and-families/getting-covered/special-enrollment

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