



### **Recent Articles and Guidance Documents**

Ethics and the Tax Preparer – AICPA Tax Advisor (November 2020)

AICPA SSTS – Two New FAQs Issued!! – AICPA Tax Section News (December 2017)

IRS Authorizations Quick Reference Guide – AICPA Tax Section Website Reference Material (June 2017)

Why the AICPA SSTSs and IRS Circular 230 Should Be Added to CPAs List of Favorite Resources – Tax Advisor (July 2016)

CP2000 Response Template with Formal Protest - AICPA Tax Section Website Reference Material (October 2015)

Best Practices to Respond to a CP2000 Notice - AICPA Tax Section Reference Material (October 2015)

### **Recent Presentations**

AICPA – Tax Practice Quarterly: 2020 Ethics Update (October 2020)

AICPA – Tax Practice Quarterly: 2019 Ethics Update (October 2019)

IRS Tax Forum, Orland – Preparer Risk – When a Practice Problem Becomes and Ethics Problem (Aug 2019)

IRS Tax Forum, San Diego – Charitable Contribution Support – How Much is Enough? (Sept 2017)

IRS Tax Forum, Dallas – Charitable Contribution Support – How Much is Enough? (July 2017)

AICPA Webcast – Tax Practice Monthly: Managing IRS Authorizations (July 2016)

AICPA Webcast – Advance Tax Quarterly: Voluntary Disclosure Program (July 2015)

CABB Webcast – Buying and Selling A Business: a CPA’s Perspective (June 2014)

105.5 FM & Money 2.0 with Andrew Rogerson talk show – Tax Tips for Businesses (Sept 2013)

## **Recent Presentations (continued)**

TMA – Accounting for Business Acquisitions (2013)

SCBA Tax Section – Accounting for Business Acquisitions (2013)

Sacramento County New Business Workshops – Choice of Entity and Tax Matters (2012 & 2013)

SCBA Tax Section - Cancellation of Debt Income from Short Sales/Foreclosures (2012)

TMA – Successfully Navigation Your Understanding of the Financial Picture (Summer 2012)

TMA – Successfully Navigating your Acquisition/Sale/Liquidation from Financial Forecast  
Through Taxable Issues (July 2012)

ASWA – Cancellation of Debt Income from Short Sales/Foreclosures (Feb 2012)

CalCPA – Planning for Succession Within Your Firm (Oct. 2011)