



# 2018 California Conference

With Annual Meeting & Chapter Elections  
5 Hours California CE

**Friday, September 21, 2018**  
7:30 AM—5:00 PM

**EMBASSY SUITE RIVERFRONT**  
100 Capitol Mall, Sacramento, CA. 95814 (916) 326 5000

Registration & Continental Breakfast open at 7:30 AM  
Breakfast, Lunch and Breaks Included with paid registration

[Register Here](#)

<https://www.natptax.com/Chapters/Pages/CaliforniaChapterEducation.aspx>

**Morning Sessions**

- 8:45 AM Marc Narelsky Taxpayers' Rights Advocate's Office  
**What The TRA Can Do For You & How to Best Utilize RA Services**  
2 Hours (CTEC #: 2014-CE-0187)
- 10:45 AM Steve Simms  
**California Compliance and Representation**  
1 Hour (CTEC #: 2014-CE-0188)
- 11:45 AM **Lunch (included)**

**Afternoon Sessions**

- 1:00 PM ANNUAL MEETING (free)**  
Separate Agenda
- 2:00 PM Tim Treichel CDFTA  
**Make up of New Department and Appeals Process**  
1 Hour (CTEC #: 2014-CE-0189)
- 3:00 PM Brett Hansen  
**TCJA Major Adjustments & New Opportunity Zones**  
1 Hour (CTEC #: 2014-CE-0190)

	PRICING	MEMBER	NON-MEMBER
<b>EARLY BIRD</b> (Before 09/01)	\$	119.00	\$ 149.00
<b>REGULAR</b>	\$	149.00	\$ 179.00
<b>AT THE DOOR</b>	\$	199.00	\$ 199.00

\$100 Cancellation Fee Before 09/01



California Chapter National Association of Tax Professionals—provider #2014—has been approved by the California Tax Education Council to offer continuing education courses that count as credit towards the annual "continuing education" requirement imposed by the State of California for CTEC Registered Tax Preparers. A listing of additional requirements to register as a tax preparer may be obtained by contacting CTEC at P O Box 2890, Sacramento, CA 95812-2890, toll-free by phone at 877.850.2832, or on the internet at www.ctec.org



Marc is a Technical Assistant to the Advocate in the Franchise Tax Board's (FTB's) Taxpayers' Rights Advocate's Office. He has been a member of the Advocate's Office since December, 2015. Marc started with the FTB in 1989, working as an Auditor and Reviewer. He has held staff positions for divisional budgeting as well as acting as a business lead for FTB's Activity Based Costing project where he learned the operations of the department.

Taxpayers' Rights Advocate  
 Communication with FTB  
 Current and Future Issues  
 Earned Income Tax Credit (EITC)  
 Fraud and ID Theft  
 Legislation  
 Power of Attorney

Level: Basic



Currently the owner of his own firm specializing in California Tax Controversy, also tax controversy involving the IRS. Steve served as the California Taxpayers' Rights Advocate for seven years. As the Advocate, he was responsible for addressing taxpayers' issues, concerns, and challenges related to income and franchise taxes. During his 32-year career with the Franchise Tax Board, Steve worked in many different areas including audit, collections, and education outreach.

California Representation

California Franchise Tax Board's Filing Enforcement Notices - Where to begin....

The Cannabis Industry Client - Things you may want to consider before you take these

Market Based Sourcing - General overview, it applies to all taxpayers doing business in

Level: Basic - Intermediate



Tim Treichelt is a Senior Tax Counsel with the California State Department of Tax and Fee Administration (CDTFA) currently assigned to the Tax Appeals Assistance Program (TAAP). At CDTFA he has had a number of assignments over the past 15 years involving the preparation and reviewing of briefs, legal memoranda, and adjudicatory briefings for personal income tax, sales and use tax, special tax/fees, and property tax appeals.

The make up of the new California Department Tax and Fee Administration

Appeals Process with the new Department of CDFTA

Level: Basic



Cost Segregation Authority He has given hundreds of presentations on cost segregation to CPAs, Wealth Advisors and Real Estate groups of 5 to 500 and has a sincere passion for helping clients

Review Extension & Modification of Cost Recovery Sys

New Category: Qualified Improvement Property (QIP)- WHAT IS HAPPENING WITH THIS?

New OPPORTUNITY ZONES and their Incentives

Level: Intermediate