

COASTAL TAX ADVISORS

NO.1

4TH QUARTER
2023

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BY KAT CANNON

SPOOKY SEASON OCTOBER

don't let taxes scare you this halloween!

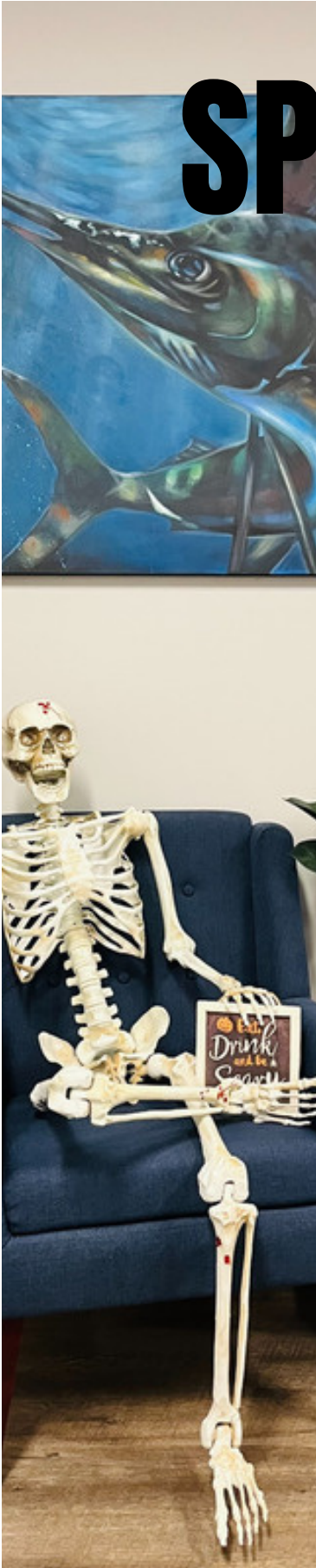


SURVIVING THE FALL TAX SEASON

This past October tax season was a rollercoaster, but we rode it through. The October deadline was changed on us, sccaAAAAaary but we weren't afraid and pushed through in time for a fun halloween.

BEST DRESSED?

Here at the office, our staff love to get in the spooky spirit. What? Accountants can be fun! Did you hear about the zombie CPA? He charges an arm and a leg!



Arrrgh very own 'Sureprep Sheila' as a pirate. Keeping true to our nautical theme.



Oh deer! Bree, one of our admin, and her husband were deer and hunter. Looks like he got the best catch.



Another one of our admin, Amy, and her husband were firefighter and dalmation! We love a woman in uniform.

OUR OFFICE GREETER, "MR. GOT EVERYTHING TO HIS CPA THE NIGHT BEFORE DEADLINE"



The Wine Corner with Dave



What is fall without a nice glass of wine? One of our partners, Dave is an avid enthusiast. Dave says that for a good white wine, he prefers a white burgundy, chardonnay based from France. For reds he consistently drinks Italian reds. With a vast collection and his great knowledge there's no questioning his judgement.



Pictured (left) Partner Jake Lincoln and Partner Dave Morgan (right).

Jake's Record Vault



Jake is the 'Jake of All trades'! While he has a passion for helping those with financial troubles he also has a keen ear for music. Record player at home and a record player in his office, it's almost a part of him. His record of the quarter is The Doors Live in Bakersfield. The Doors Live in Bakersfield is one of the more unique shows from The Doors featuring improvisations and medleys of The Doors many beloved hits from across their album.

What are you thankful for?



"I am most thankful this year for my health and my families health. I am also very thankful for all the wonderful employees we have working with us at Coastal Tax Advisors. It takes a big team to service our clients and we could not do it without each and everyone of them!"
- Dianne Lincoln



"I am thankful for family, friends and those around me. I am thankful for good health and continuous growth in life and my career at Coastal Tax Advisors. I always remind myself that life is about perspective. I am thankful this year for all the positive moments and negative moments because like the quote from Alice Morse Earl, 'Everyday may not be good, but there's something good in every day'"
- Calistus Alexander

NOVEMBER DOWNTIME

The California Franchise Tax Board confirmed that most Californians have until November 16, 2023, to file and pay their tax year 2022 taxes to avoid penalties. The IRS announced that taxpayers affected by winter natural disasters in 55 California counties qualify for an extension to file and pay their tax year 2022 federal income taxes until November 16, 2023.



This the season for year-end tax planning! Our staff is currently busy working with all our Annual Advisory Agreement clients on their year-end tax projections and plans.



DECEMBER DELIGHT



Year-end is rapidly approaching, as are the holidays. So, before you become distracted with the seasonal celebrations, it may be in your best interest to consider year-end tax moves that can benefit you for both 2022 and 2023. [more information HERE](#)

CTA PET HIGHLIGHT



Look what santa left under the tree! These two puppies belong to some of our admin. Meet Rip and Moose, two belgian malinois babies.



In San Diego, there is lots of fun to be had, especially in the winter time. Some of our office's favorite activities are seeing the various neighborhood Christmas lights like Candy Cane lane in Poway pictured top left. Visiting snowfall and eating pie in the cozy town of Julian pictured top right. Or ice-skating on the beach at the famous Hotel del Coronado pictured bottom left.

Employee Highlight

This quarter we highlight one of our managers, Diana Wiedenhoef. We have been lucky to have her for six almost seven years now. Always there to help another, Diana is very generous whether it is lending a helping hand or a good conversation. She has showed stellar work ethic and performance this quarter.



"The things I like about working at CTA are numerous.

1. The partners have created a collaborative environment in which we are all encouraged to work together and help each other succeed.
2. I like the opportunities we have to build relationships with the clients because we not only prepare tax returns but also do tax planning for them.
3. I like preparing tax returns because it enables me to constantly be learning, and in this supportive environment I have help to understand a new concept if I'm struggling with it.
4. I like that the partners give the staff and managers the room to work independently but are there when needed allowing room for growth.
5. I have a short commute.
6. I like that we all get along well. "