



INLAND SOCIETY OF TAX CONSULTANTS, INC
San Diego Chapter

7827 Convoy Court #403 • San Diego, CA 92111-1218

RETURN SERVICE REQUESTED

Inland Society of Tax Consultants San Diego Chapter Newsletter • May 2003

May, 2003 Dinner Meeting

Date	Thursday, May 15, 2003
Where	Handlery Hotel & Resort 950 Hotel Circle North Mission Valley, San Diego, CA
Times	5:00 p.m. Registration & Social 5:30 p.m. Educational Presentation 6:30 p.m. Social/Dinner Setup 7:00 p.m. Dinner 7:45 p.m. Educational Presentation 8:45 p.m. Adjourn
Cost	\$24 members with reservations \$26 members without reservations \$28 non-members, spouses, & guests
Menu	Spring Salad Chicken Piccata, Grilled Boneless Chicken on pasta with Lemon Caper Sauce Fresh Seasonal Vegetables Chocolate Mousse Cake Vegetarian Meal Is Available. Advance Request Is Required When Making Your Reservation.

RESERVATIONS

Deadline is Noon, Tuesday, May 13th

Call **1-800-994-4782** or online at
www.istcsandiego.com.

Leave your name, number of reservations, and
your telephone number.

Permanent Reservation List

See page 2 for details.

EDUCATIONAL PRESENTATIONS

“Tax Season Review” and “Tax and Retirement Planning for 2003”

Speaker

Wayne Otchis, CPA

CTEC 1000-CE-1136

(1 hour Federal credit/1 hour State Credit)

This presentation has been designed to meet the requirements of the Director of Practice of the Internal Revenue Service, the California State Board of Accountancy, the International Board of Standards and Practices for Certified Financial Planners, Inc. The Inland Society of Tax Consultants has been recognized as an approved curriculum provider by the California Tax Education Council. Successful completion of this course may be reported to fulfill the (continuing education/qualifying education) requirement of the California Business & Professions, Code Sections 22250-22259. This does not constitute an endorsement by the California Tax Education Council, or any of the other above named agencies, as to the quality of the course or its contribution to the professional competence of the preparer

FREE QUICKFINDERS®

A FREE Individual Quickfinder® will be given to
each San Diego Chapter member who:

Attends four San Diego Chapter dinner
meetings between May and November 2003

and

Registers and prepays prior to Dec. 1, 2003
for the San Diego Running Start Seminar to be
held in January 2004.

PRESIDENT'S MESSAGE

I hope that each of you had a successful tax season and are now ready to pursue some outstanding educational events within our Society and Chapter.

I would like to encourage each of you to participate in a personal way in our events. Volunteers are needed to make our events successful. Consider serving on a committee or assisting at an event. Please contact me or any Officer or Director if you are interested in helping.

We have a plethora of **educational events** that you will find valuable, either as something new or to refresh you on a topic. First, we have our Monthly Educational Dinner Meetings from May through November. These meetings will afford us the opportunity to hear varied tax topics and speakers as well as network amongst our members.

June 2-4 will be the Society Summer Symposium in Las Vegas at the Tropicana Hotel. Our Chapter, in conjunction with other San Diego County Chapters, will be hosting a networking suite each evening for all attendees at the Symposium. Come meet members from other chapters, network and have a social hour. Refreshments and snacks will be provided as well – and it's FREE!

In July, Society will be having a **two-day seminar on Estates & Trusts, July 11-12 here in San Diego** at the Handlery Hotel. It is being presented by Mary McGuire, EA and Phil Benoit, CPA who have been presenting this course for other seminar providers for some time. This is an excellent program to get you started into preparing returns for decedents and their follow-on entities. Registration forms will be at the May and June Dinner Meetings.

I would also like to announce **two new educational reimbursement programs** that we will be funding this year. First, as part of our "name badge" drawing, we will be giving away a \$25 educational certificate at each dinner meeting that can be used for any San Diego Chapter educational event. Second, we will be providing a \$100 (maximum) reimbursement for attending a multi-day Society sponsored educational event.

We also need **new members** to keep our organization alive and energetic. Few people will join a group without knowing someone or being invited to join. Let's all try to ask a new person to attend and to join. If only 10% of us are successful, we will have over 20 new members this year!

Val J. Daigle – *Chapter President*

2003 DINNER MEETING SCHEDULE

Mark Your Calendar

May 15

June 19

July 17 - Meeting with the San Diego Chapter of CSEA

August 21

September 18

October 16 – Chapter's Birthday

November 20

December 12 (Friday – Holiday Party)

2003 DINNER PRICES

Members with reservations - \$24.00

Members at the door - \$26.00

Non-members & Guests - \$28.00

PREPAID PERMANENT RESERVATION LIST

Members \$140.00 (8 Meetings) **Save \$84**

Make check payable to ISTC and mail to:

ISTC - SAN DIEGO CHAPTER

c/o 3697 Caminito Cielo Del Mar

San Diego, CA 92130-2327

or Pay at the May Dinner Meeting.

Parking fees are being discussed with the hotel.

There may be a small charge for parking.

ISTC DAY WITH THE PADRES

Plans are being made for a special day at the Padre's afternoon game with the Chicago Cubs on August 7th. Details will be announced at the May meeting, Contact Val Daigle, email val@westax.com or at 619-435-3131.

TAKE 4 AND CALL ME ...

"My husband put our tax information together this year. It was only a 4 aspirin Saturday."

A note received with the client's tax data.

NEW FORM W-7

As of 1/14/03 all resident and nonresident aliens applying for an individual taxpayer ID number must use the new Form W-7.

WELCOME TO NEW MEMBERS

Laura Castanares and Donald J. DeGreef, Jr. have joined our chapter. Say hello to them at the May meeting.

ISTC SUMMER 2003 TAX SYMPOSIUM

June 2, 3 & 4, 2003

Tropicana Hotel, Las Vegas Nevada

Earn Up To 24 Hours Federal and 16 Hours State
Continuing Education Credit

Course Offerings Include:

Sales Tax Audits, Appeals and Enforcement
Funding Education Through Credits & 529 Plans
Tax Deferred Exchange Handbook
Sale of Business Use Assets
California Differences and Credits
New Changes Effecting EIC
Small Business Issues
Divorce and Community Property
Death and Taxes – A Primer
Funding and Allocating Trusts – Separating A&B

All Day Focus Sessions:

Monday, June 2nd

Collections – Taxes Are Due – Now What?
(Gary Quackenbush, Attorney At Law)

Tuesday, June 3rd

Partnership Taxation: Odds & Ends &
Opportunities (Larry Forsyth, CPA)

	<u>Registration Fees</u>	
	By May 2nd	After May 2nd
Member	\$335	\$410
Staff	\$360	\$435
Non-Member	\$410	\$485
All Day Focus Sessions: Additional \$50 Each		

For Symposium Registration Information Contact
the ISTC Society Office at (714) 634-0484.

Hotel Rooms Are Available for \$59 per night.

Call The Tropicana at (800) 634-4000.

When making a hotel reservations refer to
Group Code ISTC.

NEW EDUCATIONAL INCENTIVES

The San Diego Chapter is offering two new educational
incentives to members this year:

Name Badge Drawing for a \$25 Education Certificate at each Dinner Meeting

At each San Diego chapter dinner meeting in 2003 a
drawing will be held for a \$25 certificate that will be
good toward any San Diego Chapter education event.
Getting into the drawing is simple. Just be sure to wear
your name badge and you are entered!

\$100 Education Reimbursement

For 2003 the San Diego chapter will reimburse each
member \$100 if they meet *all* of the following criteria:

The member must attend *one* of the following:

- San Diego Running Start,
- All General Interest Fall Workshop Classes, or
- Two (2) of the Special Interest Fall Workshop
Classes

The member must attend at least four (4)

San Diego Chapter Dinner meetings

The member must attend *one* of the following:

- Society Summer Symposium
- Society Fall Classroom Series
- Society Winter Tax Bridge

If you meet all of the criteria, contact the Chapter
Office for an Education Rebate Form. Submit the form
by December 10, 2003 to receive your rebate!

CLASSIFIEDS

TAX PREPARER BONDS ONLINE —

Simplebond.com can e-mail you your tax preparer bond
information instantly and mail you the bond the same day.
Log on to www.simplebond.com for instant and easy low
priced service, or call 858-967-5480.

PRINTING – 10% OFF to ISTC members only.

Get your printing on time from the printer of San Diego
chapter's newsletter since 1995. All printed communications
for business and personal use.

Continuous Printing, Corp. 858-748-5745.

SEEKING EMPLOYMENT – EA and Notary Public
seeks full or part time employment. Former IRS collections
agent with 24 years experience. Retired in 2002. Contact
John Yeats at (619) 449-0318 or jyeats3@cox.net.

WANTED: TAX PRACTICE EA is interested in
purchasing an existing tax practice in MID San Diego
County. Call Bob Hummer, EA. or Steve Comer at
619-698-0202.

San Diego Chapter

OFFICERS

President

Val Daigle
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CHAPTER OFFICE

7827 Convoy Ct #403
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858-278-1164 • Fax 858-278-9327



BREAKFAST MEETINGS

Join ISTC members for breakfast to discuss tax issues.
Members buy their own breakfasts.

San Diego — Second and Fourth Fridays each month at 8:00 a.m.,
at Coco's Restaurant, El Cajon Blvd. at Oregon St.
Contact Val Daigle, email val@westax.com or at 619-435-3131.

El Cajon — Wednesdays, 8:00 a.m., Denny's Restaurant Fletcher Pkwy at Navajo Rd.
Contact Larry Mahaffy at (619) 669-1630

South Bay — Tuesdays, 8:00 a.m., Love's Restaurant, I-805 at E Street in Chula
Vista. Contact Shirley Horst at (619) 422-1403.

Fiduciary Tax Group — Second Thursday of each month, 7:30 am.

New Location - Coco's Restaurant, 5550 Lake Murray Blvd, La Mesa.
Contact Jan Brown at (619) 464-1041.

Business Entities Group — First Thursday of each month, 7:30 am,

New Location - Coco's Restaurant, 5550 Lake Murray Blvd, La Mesa.
Contact Jan Brown at (619) 464-1041

CHANGE OF ADDRESS

If you move, please advise both the San Diego Chapter and the Society office of
your new address, phone and e-mail address.

- San Diego Chapter: 7827 Convoy Ct #403, San Diego, CA 92111
Tel (858) 278-7954 • Fax (858) 278-9327
Web Site: www.istcsandiego.com.
- * ISTC Society Office: 2140 W Chapman #103, Orange, CA 92868
Tel (714) 634-0484 • Fax (714) 634-4975
Web Site: www.istcsociety.org.

SAN DIEGO CHAPTER NEWSLETTER

Newsletter via Email

Supply your e-mail address to save the chapter the cost of printing and postage.

You will receive an e-mail notice when the newsletter is posted to our web site and
other important updated tax information. Send your e-mail address to
larry@taxnewsandtips.com.

Advertising

Members: There is no charge to members who wish to advertise for positions
available in their practice, equipment for sale, or similar subjects.

Non-Members: There is a \$15 charge for each advertisement in the newsletter.
Limited to six lines. Subject to available space and the discretion of the editors.

Advertising at San Diego Chapter Events: Requests to distribute flyers,
brochures or promote a business at any San Diego chapter event must be approved
by the Board of Directors prior to the day of the event.



The San Diego chapter newsletter is published monthly
in January, and May through December.

The deadline for articles and ads is the 25th the preceding month

BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is Thursday, May 15, 2003
3:30 p.m. at the Handlery Hotel in Mission Valley.