



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

**California Society of Tax Consultants
San Diego Chapter Newsletter • July 2004**

July, 2004 Dinner Meeting

Date	<u>Tuesday</u> , July 13, 2004
Where	Handlery Hotel & Resort, Presidio Room 950 Hotel Circle North Mission Valley, San Diego, CA
Times	5:00 p.m. Registration & Social 5:30 p.m. Education Presentation 6:30 p.m. Social/Dinner Setup 7:00 p.m. Dinner 7:45 p.m. Education Presentation
Cost	\$25 - Members With Reservations \$30 - All Others
Menu	<ul style="list-style-type: none"> • Spinach Salad • Grilled Chicken w/Shiitake Mushrooms, Garlic, Tomatoes & Onions in a Red Wine Sauce • Garlic Mashed Potatoes • Fresh Seasonal Vegetables • Dessert – Chef’s Choice • Vegetarian Meal Is Available <p>Requests must be made with the reservation</p>

RESERVATIONS

Deadline is Noon, Monday, July 12th

Call **1-800-994-4782** or online at
www.cstcsandiego.org.

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

No-Show Dinner Reservations Billing Policy

An individual who has made a reservation for a dinner meeting and fails to cancel the reservation by noon the day prior to the dinner meeting will be billed the Chapter's cost of the dinner.

An individual will be allowed one (1) no-show at no charge per calendar year.

**JOINT MEETING WITH THE
SAN DIEGO CHAPTER OF THE
CALIFORNIA SOCIETY OF
ENROLLED AGENTS**

EDUCATIONAL PRESENTATION

**“1031 Exchanges
TICs (Tenants-in-Common)”
(Before & After Dinner)**

Speaker

Joseph Mandelbaum, EA CFP

Joe Mandelbaum, Founder and President of Mandelbaum & Associates, has focused on real estate for more than 20 years as an investor, advisor, author, speaker and tax specialist. His extensive experience has allowed him to develop tax-savings strategies. He has authored hundreds of articles for real estate and accounting magazines, as well as contributing various chapters in books on financial planning.

Joe graduated in 1975, with a Bachelors Degree in engineering and mathematics, from The Cooper Union in New York.

He is affiliated with NAEA, CSEA, NAR, CAR, NASD and IBCFP.

CTEC 1000-CE-1487

&

CTEC 1000-CE-1494

(2 hours Federal 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 California Tax Education Council has recognized the California Society of Tax Consultants as an approved curriculum provider. 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 speaker.

PRESIDENT'S MESSAGE

Well, here we are almost on the eve of our country's day of independence, one that should make us think deeply about that monumental time in our history. I personally believe that our country's resolve is again being put to the test, both here and abroad. I also believe that we must, as a nation, stand firm and stop the spread of terrorism that is a real threat to us in this country and that extraordinary measures must be taken to defend us. Let's not be like Nero, who played his fiddle while Rome burned! Let us also pray and be thankful for our armed forces – past and present – for the sacrifices they have made and continue to make so that we can remain free and independent!

Last month, our speaker, Neal Inscoc, made us all aware that our service to our clients goes beyond putting numbers on a form. That is, we should be more than a tax preparer. Neal touched on many other financial areas that we can and should become more aware of and involved with our clients. Ask your clients, the next time you see them, when was the last time they met with their estate attorney or financial advisor. I'll bet the majority will not say within the last year. Yet, they meet with us once a year. Look at this as an opportunity to expand your practice (whether of not you decide to offer financial services) and help your clients achieve some measure of financial security.

If you are not already aware of it, we have a new policy that will allow a **potential new member** (one who is qualified for membership) to **attend one dinner meeting for FREE** if he or she is sponsored by a member in good standing. Last month we had four (4) sponsored guests: Nathan Medina, Jonathan Lea, C.J. Hogenwoning and Tom Dolan. I hope to see each of you again soon and welcome you as new members. Four new members joined last month – see the next article.

This month is the Society Board Meeting (July 19). If you have any input, please contact me. All Society Officer positions are open for nominations this year – if interested, let me know.

Also, our Chapter nominations are coming soon. If you are interested in being an Officer or on the Board of Directors, please let me, Nadine Allevato (Nominations Chair) or any current Board member know.

Forms for the **"Fall Workshops"** are available now for *early bird* specials. Contact Greta Ward for more details. Sign up early for the greatest savings. There is a wide variety of general and special interest courses to help you in your practice.

Val J. Daigle – *Chapter President*

WELCOME NEW MEMBERS!

The San Diego Chapter of CSTC would like to extend a warm welcome to the following people:

Ben Domurat, EA
H. (Robbie) Robinson, CRTP
Hulda (Sissy) Isham, CRTP

CSTC has long been dedicated to its members, by focusing on education and professional support, in order to maintain a high level of professionalism.

Congratulations on joining our organization and chapter.

We would also like to welcome Nancy Mendenhall, who has transferred from the East County Chapter.

SPONSORED GUESTS

San Diego Chapter members may bring a guest who qualifies as a prospective member of the Chapter. Qualifications may include CPAs, EAs, CRTPs, CFPs, Attorneys, etc. (i.e.: must be in the tax field).

Chapter members must specify, **WHEN MAKING DINNER MEETING RESERVATIONS**, that the guest is qualified. The guest will be asked to fill out an information card, which will be available upon check-in.

This guest may qualify for the **ONE-TIME FREE** dinner meeting.

This recruiting incentive will help prospective members to become familiar with our organization.

BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is
Tuesday, July 13, 2004, 3:30 p.m.
at the Handlery Hotel in Mission Valley.

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 2004, **and**
- Registers and prepays prior to December 1, 2004 for the San Diego Running Start Seminar to be held in January 2005.

Simple to get ... so don't be left out!

FTB/CTEC TEAMWORK

FTB's Visit to Tax Preparation Offices Help Identify Illegal Preparers

While conducting office visits during January, February and March of this year, the Fraud Team of the Franchise Tax Board assisted CTEC in identifying unregistered tax preparers. FTB visited with 285 tax practitioners in 50 California cities throughout the state. Out of the 285 practitioners visited, 34 individuals were found to be preparing tax returns illegally – either not registered at all or not having renewed their registration for the current tax year. The FTB informed these illegal preparers of their responsibility to register with CTEC, gave them information on how to register or renew, and passed their names onto CTEC for additional follow-up and monitoring.

For the last several years, CTEC and the Franchise Tax Board have worked together in an effort to protect California taxpayers from being taken advantage of by individuals who are preparing taxes for a fee but do not meet the educational requirements or are not bonded. Many CRTPs have horror stories of taxpayers who have been bilked by unscrupulous preparers. If you are aware of individuals preparing illegally, call, write or email CTEC with details. These individuals will be contacted. You can contact CTEC by:

- Phone: 877-850- 2832
- FAX: 877-851-2832
- Internet: www.ctec.org.

NOTE: When you need to find a word that describes your status as a professional tax preparer, you should not use the word “licensed”. Instead, use “registered”. Don’t say, “I am a licensed tax preparer”, but rather say, “I am a **CTEC Registered Tax Preparer**, or **CRTP**.”

CTEC RENEWAL REGISTRATION EXTENDED

At the November 2003 CTEC Board Meeting, a resolution was passed to extend the expiration date of October 31st for those registered preparers who are the victims of a federally declared disaster area or those preparers returning from military service.

In both cases, federal disaster and active military service, CRTPs will have additional time to complete the registration process without penalties or late fees and/or expired registrations. If you fall into either of these categories, contact CTEC for further details. You can contact CTEC at 877-850- 2832.

EDUCATIONAL INCENTIVES

Name Badge Drawings for \$25 Education Certificates at each Dinner Meeting

At each San Diego chapter dinner meeting in 2004 two drawings will be held for \$25 certificates 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 2004 the San Diego Chapter will reimburse each member \$100 if they meet *all* of the following criteria in 2004:

The member must attend *one* of the following:

- San Diego Chapter’s Running Start Seminar held in January 2005,
- 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 between May and November 2004;

The member must attend *one* of the following:

- Society Summer Symposium – May 2004
- 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, 2004 to receive your rebate!

RUNNING START 2005

Mark your calendar for the 2005 Running Start Seminars:

East County, January 4, 2005 - Singing Hills Resort
San Diego, January 5 & 6, 2005 - The Handlery Hotel
North County, January 8, 2005 - Calif. Ctr. for the Arts

Seminar prices:

	Members	Non-Members
Sept 1 – Oct 31, 2004	\$130	\$175
Nov 1 – Dec 18, 2004	\$160	\$175
After Dec 18, 2003	\$175	\$195
Outline only	\$25.00	

Watch for more details in future newsletter issues. You won’t want to miss another year with Dave Gorsich and Mike Karll.

CSTC - SAN DIEGO CHAPTER

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BOARD OF DIRECTORS

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CHAPTER OFFICE

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CSTC DUES & EDUCATION

Membership Dues are Due July 1, 2004.

- Member Renewal - \$120.00
 - New Members - \$145.00
 - Late Charge - \$15 (Payments after 8/15/04)
- Contact Nadine Allevato, 858-271-1199, for details.

Education at the Society office in Orange, CA:

- **Fundamentals Course** - \$235.00
- **Correspondence Course** - \$450.00

Contact Bev Switzer at 714-634-0484 or
www.cstcsociety.org.

2004 DINNER MEETING SCHEDULE

July 13 – Joint Meeting with the San Diego Chapter of CSEA

Joe Mandelbaum – 1031 Exchanges & TICs

August 19 – Steve Sims, FTB

September 16 – Ron Peters, IRS

October 21 – Chapter's Birthday – Lynn Freer

November 18 – Wayne Ochiss

December 10 - (Friday) **Holiday Party**



BREAKFAST MEETINGS

Join CSTC 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, 7:30 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, Carrows, 368 Broadway, El Cajon. Contact Jan Brown at (619) 464-1041.

Business Entities Group — First Thursday of each month, 7:30 am, Carrows, 368 Broadway, El Cajon. 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
Website: www.cstcsandiego.org.
- CSTC Society Office:
2050 W Chapman Ave #114 Orange, CA 92868
Tel (714) 634-0484 • Fax (714) 634-4975
Website: www.cstcsociety.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.

Deadlines

The deadline for articles and ads is the 25th of the preceding month. If an ad is to be run more than one month, please advise the editor via email at badgern@sbcglobal.net or telephone 619-698-0508. (You may also fax the information to me at 619-698-9735.)

NEW CHAPTER WEBSITE

The San Diego Chapter's website is now located at
www.cstcsandiego.org.

CLASSIFIEDS

Note From Editor: Please use "CSTC Ad" as the subject when you e-mail your ads to me. This will alert me that it is a legitimate e-mail (and not SPAM). Thank You!

Ads are also posted on the Chapter's website as they are received.

WANTED: EA seeking tax and/or bookkeeping practice to purchase. Contact Tony Applebaum or Christy Almond at 619-237-7290.

WANTED: EA wants to increase client base and expand practice geographically – offices in Coronado and UTC area. If you are thinking of selling or retiring, please contact Val Daigle at 619-435-3131 or at val@westax.com.

WANTED: SD Chapter member looking to increase client base at Mission Valley office. If you are thinking of retiring or selling some/all of your clients, please call Terry Smith at 619-283-8055.

FOR SALE: Lanier 6540 Analog Copier (40 copies per minute) with Automatic Document Feeder, High Capacity Paper Bin (750 pages), Two Additional Paper Drawers, 20-bin Sorter. Well maintained under Lanier Maintenance Contract. Lanier inspection and refurbishment of parts was completed recently. Reasonable offers accepted. Call Val Daigle at 619-435-3131.

NEED WORK OUT OF TAX SEASON: 23 years tax experience (Self-employed dba Unique Tax Service), 20 years bookkeeping experience and extensive payroll experience. Resume available upon request. Call San Diego Chapter member Janette Meader at 619-688-6510 (work) or 858-571-7062 (home).

WANTED: EA looking to increase payroll client base. Bookkeeping & tax clients can be added to the deal, but mainly interested in payroll. If you are thinking of retiring of just tired of the demands of payroll, please call Edward Lindgren at 858-560-4146, ext. 4.