



California Society of Tax Consultants

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

Formerly – Inland Society of Tax Consultants

California Society of Tax Consultants
San Diego Chapter Newsletter • December 2004

December, 2004 Dinner Meeting

Date **Friday**, December 10, 2004

Where Handlery Hotel & Resort, Garden 1 Room
950 Hotel Circle North
Mission Valley, San Diego, CA

Times **6:00 p.m.** Registration & Social
7:00 p.m. Dinner
7:45 p.m. Awards • Installation of 2005
Officers & Board of Directors •
Party Time • Entertainment

Cost \$25 - Members With Reservations
\$30 - All Others

Menu **SELECT ONE:**
Prime Rib, Seasoned & Slow-Roasted; served
with Au-Jus and Creamy Horseradish
OR
Turkey Medallions, Tender-Roasted; served with
Apple Chutney
• Chef's Choice Starch Side & Vegetables
• Chef's Choice Holiday Dessert
OR
Vegetarian Meal Is Available Upon Request

2004 Holiday Party



**Come Celebrate
The Holiday Season!
Friends! Food! Fun!
Entertainment!**

**This year's charity is
Casa Cornelia Law Center
Specifically....their Program for
Unaccompanied Children
Please bring an unwrapped gift for a
teenage boy, age 14 – 18 years
You may also bring stuffed animals for the
young children of abused women in
another of Casa Cornelia's programs**

RESERVATIONS

Deadline is Noon, Thursday, December 9th
Call **1-800-994-4782** or online at www.cstcsandiego.org.
Leave your name, number of reservations,
your telephone number and **Specify Your Meal Choice**
Prime Rib, Turkey, or Vegetarian.

Permanent Reservation List Members
MUST Make A Reservation for the Holiday Party.
The Holiday Party IS INCLUDED as part of your prepayment.

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 meeting will be billed the Chapter's cost of the dinner.
An individual will be allowed one no-show at no charge per calendar year.

PRESIDENT'S MESSAGE

This month is **my farewell** month; term limits prevent me from remaining in this position any longer! All kidding aside, it has been a wonderful, challenging and demanding two years as the leader of this great chapter. I want to thank all the Officers, Directors, Committee members and other volunteers who have given so much of their time and effort to "make things happen". For those members who have not had the opportunity to serve, you will find it very rewarding – so volunteer!

Our **November speaker**, Wayne Otchis, made another outstanding and entertaining presentation covering some of the new laws and other practice management tips. Wayne certainly has a way of explaining complex tax laws in an amusing way. If you missed Wayne, you missed a great presentation.

Our annual **Holiday Party will be held Friday, December 10 at 6:00pm** and I hope to see you there to share your holiday spirit with our chosen charity, Casa Cornelia Law Center (for detained children). Our chapter has always been generous in sharing our good fortune with those less fortunate – especially children. I know this year will be another season of that generosity. Make your dinner reservations now!

In addition to the holiday spirit of the evening, we will be installing the newly elected Officers and Directors for 2005. This is the time to show your support for the new leadership of the Chapter.

Just around the corner is tax season. With two major tax laws (read that as more complexities) passed in the last three months of the year, we will all be scrambling to get an understanding of those changes when our first client walks through the door! But, don't lose too much sleep over it. We have just the answer for you – **Running Start 2005**. Dave Gorsich and Michael Karll will make these laws understandable and provide us with a good resource manual to refer to during the hectic days ahead. If you have not already signed up for Running Start, see our website for a registration form.

Mark your calendars now for **CSTC's Summer Symposium 2005** to be held at Harrah's in Laughlin, NV, May 23 – 25, 2005. This will be the first time in six years that our symposium has been held in Laughlin. There will be some new

and exciting speakers as well as some good speakers we have had at past Symposiums. Look for the flyers with registration forms at Running Start. Early bird sign-up ends March 15, 2005 so be sure to mark your calendar.

Happy Holidays and Pray for the safe return of our military men and women.

Val J. Daigle – *Chapter President*

SOCIETY NOTES

EDUCATION:

Summer Symposium **2005** – will be held May 23-25 at Harrah's in Laughlin, NV.

Previously held symposiums at Laughlin were huge successes.

Summer Symposium **2004** – there are numerous course material texts from all sessions available for purchase from the Society office.

If interested, contact Society for prices and availability at cstcsociety@sbcglobal.net.

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 become familiar with our organization.

HOLIDAY PARTY CHARITY

This year, the San Diego Chapter has picked Casa Cornelia Law Center for sponsorship – specifically, their program for detained children.

Representing Casa Cornelia will be Rose Kasusky, who will give us more insight as to how the program is run and who benefits from it.

EDUCATIONAL INCENTIVES

\$100 Education Reimbursement

For 2004 the San Diego Chapter will reimburse each member \$100 if they meet *all* of the following criteria in 2004:

1) 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 (**see page 6**), or
- Two (2) of the Special Interest Fall Workshop Classes

AND

2) The member must attend at least four (4) San Diego Chapter Dinner meetings between May and November 2004; **AND**

The member must attend one of the following:

- Society Summer Symposium – May 2004
- Society Fall Classroom Series
- Society Winter Tax Bridge

Download the Education Rebate Form for the chapter's website or contact the Chapter Office. Submit the form by December 10, 2004 to receive your rebate.

RIA TAX GUIDES AND QUICKFINDERS

Discounted Prices for CSTC members:

RIA Tax Guide

- Federal Tax Guide \$23
- California Tax Guide \$24
- Fed & CA Tax Guide Set \$43 (Save \$4)

Quickfinder (orders must be received by 12/12/04)

- Individual 1040 - Book or CD \$37.31
- Small Business – Book or CD \$37.31
- All States – Book or CD \$65.06

Order forms are available at the chapter's website www.cstcsandiego.org and at the chapter office (please call 858-278-7954).

The RIA books will be available for pickup at the San Diego Chapter Running Start Seminar, so don't wait...get your order in now.

1040 RUNNING START - JANUARY 2005 UPDATE

SPEAKERS

DAVE GORSICH AND MIKE KARLL

This year's Running Start will be held as follows:

San Diego – Wed. & Thur., Jan. 5 & 6, 2005 at The Handlery Hotel, 950 Hotel Circle, San Diego

East County – Tues., Jan. 4, 2005 at Singing Hills Country Club, 3007 Dehesa RD, El Cajon

North County - Sat., Jan. 8, 2005 at The California Center for the Arts, 340 N Escondido Blvd, Escondido

Registration: 7:30 am

Seminar: 8:00 am to 4:30 pm

Registration forms are available at the San Diego Chapter Office and the Chapter's website www.cstcsandiego.org

Prices / Lunch Included:

\$160.00 Members	Through Dec 17, 2004
\$175.00 Non-Members	Through Dec. 17, 2004
\$175.00 Members	After Dec. 17, 2004
\$195.00 Non-Members	After Dec. 17, 2004

The seminar offers 6 hours of Federal credit and 2 hours of State credit (CTEC#: 1000-CE-1124) so be sure to sign up before December 17th to avoid additional cost for this valuable (and entertaining) education experience.

Contacts for additional site information are:

San Diego – Randy Dahlin, (619) 697-3000

East County – Joe Foti, (619) 465-4739

North County – Kathy Musselman, (760) 942-2509

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

IRS & FTB TAX FORMS & INSTRUCTIONS

IRS and FTB tax forms and instructions can be obtained on-line at www.irs.gov and www.ftb.ca.gov.

Tax forms and instructions for other states can be obtained from the states' websites. www.taxsites.com/state.html has links to all states if you need forms and instructions for states other than California.

However, for forms and instructions in paper 'booklet' format, you can order 'Package X' from IRS and California (FTB).

Federal Package X – It's Free!

IRS has mailed Pub. 1045 to order 2004 Package X. Order on-line if you receive Pub.1045 in the mail. You will need the account number from the Pub. 1045 mailing label.

If you do not receive the Pub. 1045 by mail, you must submit a form 3975 to order Package X. If you need a Pub. 1045, you can download it from the IRS website at www.irs.gov.

Form 3975 is also used to order certain IRS Publications and the CD Pub. 1796 CD-ROM. The form also states that you can save \$5 by ordering Pub. 1796 CD-ROM on-line at <http://bookstore.gpo.gov/>.

However, this webpage has not been updated and order forms for the 2004 version is not yet posted (as of Nov. 1, 2004).

California Package X – It costs!

FTB has mailed the order form 3445D to use for ordering:

1. 2004 Package X – the price is \$18
2. Prior year Package X – the price is 14
3. Subscribe to FTS "Tax News" bimonthly newsletter.
 - It's \$12 for one year or \$24 for two years
 - It's **FREE** if you subscribe at the FTB website at www.ftb.ca.gov/professionals/taxnews/tn_sub.html.

You can also order FTB Package X and subscribe to Tax News on-line at www.ftb.ca.gov/professionals/packageX/index.html (Good luck figuring out your FTB account no.), or

Call FTB at (619) 845-7070 to have them send you a "2004 Package X / Tax News order form, FTB form 3545D MEO (Rev 10-2004).

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. Ads are limited to six lines and are subject to available space and the discretion of the editors.

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

Advertising at San Diego Chapter Events:

Requests to distribute flyers, brochures and/or to promote a business at any San Diego chapter event must be approved by the Board of Directors prior to the day of the event. (*You may also fax the information to me at 619-698-9735.*)

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 phone 619-698-0508.

CLASSIFIEDS

Editor's Note: Please use "CSTC Ad" as the subject when you e-mail your ads to me. This will alert me that it is legitimate e-mail (not SPAM). All ads will be removed from the January newsletter unless I am notified in writing by January 10, 2005. 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

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. . First offer over \$150 gets it. Call Val Daigle at 619-435-3131.

WANTED: Tax preparer needed for the tax season. There is potential for future year-round employment. Fax resume to (619) 237-5179, Attn: Christy Almond.

HELP WANTED. Part Time position available for data entry & clerical duties. Call 858-278-1164.

EA RENEWAL REMINDER

Enrolled Agents now renew on a staggered cycle, which depends on the ending number of your Social Security Number. Information as to when you need to renew can be found at www.irs.gov/taxpros/agents/index.html.

Don't let your Enrolled Agent status lapse. Log on today to find your correct renewal period.

ALERT: If your Social Security Number ends with a 4, 5 or 6 then you must apply for renewal between November 1, 2004 and January 31, 2005. Your current Enrollment card expires on March 31, 2005.

PRINTER/COPIER PAPER

Kelly Paper is offering CSTC members a discounted price for their Paperline 92 brightness, 81/2 x 11 clean paper.

- Price: \$24.50 per case.
- Minimum order is 10 cases
- Orders must be drop-delivered to you

Kelly Bond paper (brightness 84) is also available. Cost is \$23.00/case with a minimum of 10 cases, drop-delivered.

To order and schedule a delivery, call Kelly Paper at (858) 503-0808. When ordering, please identify yourself as a CSTC member and which paper, Paperline 92 or Kelly Bond, to have the correct paper delivered.

LET US HAVE YOUR INPUT!

Our Chapter Board of Directors would like some input regarding the Fall Workshop's:

- Topics
- Saturday classes/seminars
- Full-day events (2 Workshops, same day)
- Speakers
- How many members attended

We would like some suggestions on how to improve this important education series. Please take a few moments to help better this program.

VISA AND MASTERCARDS ACCEPTED

The San Diego Chapter accepts Visa and MasterCard credit cards in payment for San Diego Chapter services and events. For more information, contact Duane Lewis, San Diego Chapter Treasurer, at 619-698-9191.

CHAPTER WEBSITE

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

CSTC - San Diego Chapter

OFFICERS

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CHAPTER OFFICE

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BREAKFAST MEETINGS

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

San Diego – Second and Last Fridays each month at 7:30 a.m., at Coco's Restaurant, El Cajon Blvd. at Oregon St. Contact Val Daigle at 619-435-3131 or email val@westax.com.

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, Coco's at Lake Murray & Baltimore, La Mesa. Contact Jan Brown at (619) 464-1041.

Business Entities Group — First Thursday of each month, 7:30 am, Coco's at Lake Murray & Baltimore, La Mesa. Contact Jan Brown at (619) 464-1041.

BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is Friday, December 10, 2004, **10:00 a.m.** in the California Room at the Handlery Hotel in Mission Valley.
