



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

**California Society of Tax Consultants  
San Diego Chapter Newsletter • May 2006**

**May 18, 2006 Dinner Meeting**

<b>Date</b>	Thursday, May 18, 2006
<b>Where</b>	Handlery Hotel & Resort, Crystal Room 950 Hotel Circle North Mission Valley, San Diego, CA
<b>Times</b>	5:00 p.m. Registration & Social 5:30 p.m. Speaker 6:30 p.m. Social/Dinner Setup 7:00 p.m. Dinner 7:30 p.m. Speaker continues
<b>Cost</b>	\$25 - Members with Reservations \$30 - All Others
<b>Menu</b>	<ul style="list-style-type: none"> <li>• Crisp Garden Salad</li> <li>• Chicken En Croute-Boneless Breast Wrapped in Puff Pastry; Served with Garlic Mashed Potatoes and Beurre Blanc Sauce</li> <li>• Fresh Seasonal Vegetables</li> <li>• Chef's Choice Dessert</li> <li>• <b>Vegetarian Meal Is Available</b></li> </ul> <p><b>Requests must be made with reservation</b></p>

**RESERVATIONS**

Deadline is Noon, Wednesday, May 17th

Call **1-800-994-4782** or email to Rose Carter at [racarter@sbcglobal.net](mailto:racarter@sbcglobal.net)

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

**No-Show Dinner Reservations Billing Policy**  
See page 2.

**PREPAID PERMANENT RESERVATIONS**

Members \$160.00 (8 Meetings) **Save \$40**

Deadline is May 31, 2006

Make check payable to CSTC or call (619) 698-9191 to pay by Visa or Mastercard (only)

Pay at the May Dinner Meeting or mail to  
CSTC - SAN DIEGO CHAPTER  
2234 Fletcher Parkway #A  
El Cajon, CA 92020-2102

**EDUCATIONAL PRESENTATION**

***"IRS AUDIT REPRESENTATION"***

*(Before & After Dinner)*

**Speaker**

Anthony Bustos

Former IRS Revenue Agent

Anthony Bustos, EA, graduated from CSUF with a BA in Business Administration-Accounting. Mr. Bustos was employed by the Internal Revenue Service for several years as a Revenue Agent auditing individuals, businesses, corporations and partnerships, as well as researching tax laws, court cases and revenue rulings. He now represents clients before the IRS and FTB in audit, special problems and collection matters such as wage levies, payment agreements, hardships and consultations regarding Offers in Compromise. His practice provides tax preparation and tax planning. He has appeared on the nationally televised Trinity Broadcasting Network's "Battlelines" program. Anthony is the current 1<sup>st</sup> V.P. of CSTC Society.

**CTEC 1000-CE-1816  
(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 of the speaker.

## PRESIDENT'S MESSAGE

Dear Friends,

Well, we made it through again. I hope that the 2006 season was your best ever, and that you have been able to enjoy some down time and get your sanity back.

Unless you are in this business, I don't think you can appreciate the sheer volume of work that has to be done in such a short amount of time. Of course, our clients don't understand.

Someone in my office suggested that everyone in America should work at least one season in a tax office so they can empathize with what we go through. Suffice it to say, I salute you for the hard work and dedication that you put into every tax season.

And now, on to the future! Believe it or not, we will have our first dinner meeting on May 18th at the Handlery. Our good friend Anthony Bustos will be speaking on audit representation. As most of you know, Anthony is an outstanding speaker. He is a former IRS field auditor, and specializes in audit representation in his practice. IRS has made no secret that audits are on the rise, so this topic is particularly timely and I am sure will be useful for all of us.

The CSTC Summer Symposium is coming up May 21 – 24 in Reno. The Symposium is always an outstanding program, and this year it coincides with the celebration of both the Symposium's 20th anniversary and CSTC's 40th anniversary. There will be events marking both of these milestones, and there is still time to register. For more info go to [http://www.cstcsociety.org/SOCIETY/pages\\_eps.pdf](http://www.cstcsociety.org/SOCIETY/pages_eps.pdf).

Looking forward to an outstanding summer and the rest of the year. See you on May 18th!

*Tony*

Tony Applebaum  
Chapter President

## OUR CHAPTER NEEDS VOLUNTEERS

WE NEED VOLUNTEERS. Don't be shy, we all started where you will be.

If we don't get some more new volunteers to step into some of these committees and learn from these "veterans", we will all soon suffer. We simply do not have enough new members stepping in to help.

Without volunteers, we will not be a successful chapter. We need you to become committee members and learn the "how" of that committee so that in the next year or so, you can step up to chairperson. Right now we don't have enough newer members on committees to be mentored. Members who have been on committees but have had some time off are also encouraged to volunteer.

Please contact any Board member and let us help you help us.

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## BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is Thursday, June 15, 2006, **4:00** p.m. at the Handlery Hotel in Mission Valley.

All members are welcome to attend. If you would like to attend, please contact Tony Applebaum at (619) 237-7290 or e-mail: [tony@appletaxgroup.com](mailto:tony@appletaxgroup.com).

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## 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.

## CSTC SUMMER 2006 TAX SYMPOSIUM

May 21-24, 2006

### Silver Legacy Hotel in Reno, Nevada

Cost:	3-Day Package	1-Day Rate
Members:	\$425.00	\$220.00
Staff:	\$450.00	\$245.00
Non-members:	\$510.00	\$280.00

For more information contact the CSTC Society Office at (714) 634-0484.

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### EDUCATIONAL INCENTIVES

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

At each San Diego chapter dinner meeting in 2006 three 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 2006 the San Diego Chapter will reimburse each member \$100 if they meet all of the following criteria in 2006:

- A. The member must attend one of the following:
- San Diego Chapter's Running Start Seminar held in January 2007,
  - Two Sessions of San Diego Chapter's Mini Symposium Special Interest Classes, or
  - San Diego Chapter's two-day Mini Symposium Case Study Classes

**and**

- B The member must attend at least four (4) San Diego Chapter Dinner meetings between May and November 2006.

**and**

- C The member must attend one of the following:
- Society Summer Symposium – May 2006
  - 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 8, 2006 to receive your rebate!

## MINI SYMPOSIUM

September 6<sup>th</sup> through the 8<sup>th</sup>

September 6 – TBA

(SPECIAL INTEREST CLASSES)

September 7 & 8 – **DEATH OF A TAXPAYER;**

#### **A CASE STUDY FROM BEGINNING TO END**

- **Final Return**
- **Beneficiaries**
- **1041?**
- **706?**

Speakers: Sylvia Lang, EA, Jan Brown, EA and Tom Carter, EA

Cost: September 7th & 8<sup>th</sup> is \$125, for both days  
September 6<sup>th</sup> is \$65 per 6 hr. day

6 Hrs CPE, each day

Contact Rose Carter for details and registration at (619) 698-0508 or email [racarter@sbcglobal.net](mailto:racarter@sbcglobal.net).

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### ENROLLED AGENTS EXAM

IRS officials announced changes to the Special Enrollment Examination (SEE) in 2006. A private firm, Thomson Prometric, a nationwide testing firm, has been selected to develop and administer a computer-based version of the exam on behalf of the IRS.

The IRS expects that Thomson Prometric will deliver the new version of the SEE in October 2006.

The examination will be offered at approximately 300 testing centers operated by Thomson Prometric. Previously, the IRS has only been able to offer testing at about 90 locations. Candidates will take the examination at a computer terminal.

Additionally, candidates:

- Will have an eight-week window to take the exam
- Will not be required to take all parts in one sitting
- Who pass a portion of the SEE will be allowed to carryover their scores
- Will be permitted to take each part of the SEE up to four times per calendar year.

For more information visit the IRS website at [irs.gov/newsroom/article/0,,id=156141,00.html](http://irs.gov/newsroom/article/0,,id=156141,00.html).

## SAN DIEGO CHAPTER

### OFFICERS

#### President

**Tony Applebaum**

(619) 237-7290

e-mail: tony@appletaxgroup.com

#### 1<sup>ST</sup> V.P. – Education & Speakers

**Rose Carter – Running Start Seminar**

(619) 698-0508

e-mail: racarter@sbcglobal.net

#### 2<sup>ND</sup> V. P. – Dinner Meetings and Arrangements

**Steve Comer**

(619) 698-0202

e-mail: scomer@tfs-lm.com

#### Secretary

**Stephanie Matticks**

(619) 697-2950

e-mail: stephanie007@sbcglobal.net

#### Treasurer – Finance/Budget

**Duane Lewis**

(619) 698-9191

e-mail: duane@fhfs.sdcoxmail.com

### BOARD OF DIRECTORS

#### Past President –

*Government Affairs/IRS Liaison and Elections*

**Val Daigle**

(619) 435-3131

e-mail: val@westax.com

#### Memberships

**Nadine Allevato**

(858) 271-1199 or (858) 549-9500

e-mail: nadine@9747bpa.com

#### Newsletter Editor

**Naomi Badger**

(619) 698-0508

e-mail: badgern@sbcglobal.net

#### Hall of Fame

**Shirley Henry-Bisantz**

(602) 224-9038

e-mail: shirley@kachinaranch.com

#### Director

**Mary Jo Hughes**

(619) 397-5360

e-mail: johughes@pacbell.net

#### Director

**Jim Quinlan**

(858) 673-7161

e-mail: quinlan@sbcglobal.net

#### Fall Workshops

**Greta Ward**

(619) 644-1752

e-mail: abacus1@sbcglobal.net

### CHAPTER OFFICE

7827 Convoy Ct. #403, San Diego, CA 92111-1218

(858) 278-7954 • Fax (858) 278-9327

#### Web Site

**Larry McClellan**

(858) 278-1164 • e-mail: larry@taxnewsandtips.com

## 2006 DINNER MEETING SCHEDULE

**June 15** – Gregory Smith, County Assessor – Topic TBA

**July 11 (Tuesday)** – Joint meeting with and hosted by San Diego Chapter of CSEA – Topic: *Paperless Office*

**August 17** – Sylvia Lang, EA – Topic TBA

**September 21** – Ginita Wall, CPA, CFP – Topic TBA

**October 19** – Chapter's Birthday; Speaker Lynn Freer  
Topic: *California Update*

**November 16** – Steve Sims, FTB – Topic TBA

**December 8 (Friday)** – Holiday Party

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### 2006 DINNER PRICES

- Members with Reservations - \$25.00
- All Others - \$30.00

Make check payable to CSTC or  
pay by Visa or Mastercard (only)



### BREAKFAST MEETINGS

During the filing season join CSTC members  
for breakfast to discuss tax issues.  
Members buy their own breakfasts.

**San Diego Chapter** — Beginning Friday May 13; we meet on the 2nd and Last Friday of each month at 7:30 a.m. at Coco's Restaurant, 5955 Balboa Ave, in the Clairemont area. Contact Val Daigle, email val@westax.com or 619-435-3131.

**East County Chapter** — Wednesdays at 8:00 a.m., at Denny's Restaurant, 2691 Navajo Rd., El Cajon. Contact Maryann Shefeland at 619-464-1260.

**South Bay Chapter** — Tuesdays at 8:00 a.m., at Love's Restaurant, I-805 at E Street in Chula Vista. Contact Donita Chacon at (619) 470-9293.

**Fiduciary Tax Group** — Second Thursday of each month at 7:30 am, at Coco's Restaurant, 5550 Lake Murray Blvd, La Mesa. Contact Jan Brown at (619) 464-1041.

**Business Entities Group** — First Thursday of each month at 7:30 am, at 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.cstcsandiego.org](http://www.cstcsandiego.org).
- **CSTC SOCIETY OFFICE:**  
**NEW ADDRESS:**  
2050 W Chapman Ave # 114  
Orange, CA 92868-2648  
Tel (714) 634-0484 • Fax (714) 634-4975  
Web Site: [www.cstcsociety.org](http://www.cstcsociety.org).

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## 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](mailto:larry@taxnewsandtips.com).

### Advertising

*Submit your articles and ads to Naomi Badger (619) 698-0508 or email to [badgern@sbcglobal.net](mailto:badgern@sbcglobal.net).*

**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 25<sup>th</sup> of the preceding month/*

Ads are posted on the chapter's web site as they are received. Submit your ad if you are looking for a tax preparation position, need help in your office, or have or looking for office space, or have equipment for sale.

## IRS – "TAX TALK TODAY"

Tax Talk Today is dedicated to providing continuing education and information for tax practitioners. This series of monthly 60-minute webcasts covers current issues of interest to the tax professional community. You can participate live or review the archived programs. Check it out at [www.taxtalktoday.tv](http://www.taxtalktoday.tv).

### 2006 Programs:

- **Political Intervention: Do's and Don'ts for Charities and Churches**
- **Earned Income Tax Credit**
- **Business**
- **International Issues and U.S. Taxpayers**
- **Why Fix Mistakes in Retirement Plans Now Rather Than Later?**  
Tuesday, June 13, 2006  
2:00 p.m. - 3:00 p.m. ET
- **Bankruptcy Abuse Prevention and Consumer Protection Act of 2005 (BAPCPA)**  
Tuesday, July 11, 2006  
2:00 p.m. - 3:00 p.m. ET

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## CLASSIFIEDS

**Want to downsize or semi-retire?** I would like to expand my Mission Valley practice (located across from Qualcomm Stadium). Call Terry at (619) 283-8055.