



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

California Society of Tax Consultants San Diego Chapter Newsletter • December 2006

December 8, 2006, Holiday Party

Date **Friday**, December 8, 2006

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

Times 6:00 – 7:00 p.m. Registration & Social
7:00- 10 p.m. Dinner & Entertainment

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

Menu

- Charbroiled Thick Cut Filet Mignon & Jumbo Prawns in Drunken Sauce
- Garlic Mashed Potatoes
- Spinach Salad
- Desert, Chef's choice
- **Vegetarian Meal Is Available**

Requests must be made with reservation

RESERVATIONS

Permanent Reservation List Members
MUST make a reservation for the Holiday Party.

Deadline is Noon, Thursday, December 7th.

Make Your Reservation by:

- On line at www.cstcsandiego.org/is-res.htm,
- Call 1-800-994-4782, or
- E-mail Rose Carter at racarter@sbcglobal.net

If you want a Vegetarian Meal, your request must be made when you make your reservation.

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

No-Show Dinner Reservations Billing Policy
See page 4.

HOLIDAY PARTY

Come to the chapter's holiday party to enjoy yourself before the tax filing season.

CSTC CHARITY

MEALS ON WHEELS

MISSION: To continue our 45 year history of helping seniors remain independent, in the security of their own homes.

Important information regarding Meals On Wheels in the President's Message on page 2.

SPEAKER

Dr. JAMES JOHNSON
President & CEO of Meals on Wheels

MUSIC & DANCING

Live music with "The Players",
A six-piece band providing
San Diego entertainment since 1992.

Music for listening and DANCING will cover
Motown, rock, pop, classic oldies, swing, R&B, 70's
funk, disco & hits from 70's-90's.

For a preview of their music go to
www.ThePlayersMusic.com

CHAPTER ACTIVITIES

2007 Officers and Board of Directors
Member of the Year
Hall of Fame

PRESIDENT'S MESSAGE

Dear Friends,

Last month we had a presentation from Wayne Otchis. Wayne has spoken to us several times, and as always he was excellent - entertaining and informative. I hope that he will visit us again soon.

Believe it our not, it is time to start thinking about the **1040 Running Start Seminar** in January. Applications are available at the Chapter Web Site.

We are looking forward to our annual **Holiday Party** on December 8th. This is always a fun time to get together, socialize and to help out a local charity.

This year we will be supporting **Meals on Wheels** of Greater San Diego. The Meals on Wheels mission is to support the independence and well being of seniors. Meals-on-Wheels Greater San Diego, Inc. has been delivering meals to local seniors for more than 45 years. They deliver 600,000 lunch and dinner meals each year. They are the only agency home-delivering two meals a day for 7 days a week throughout San Diego County from San Ysidro to Oceanside, Alpine to the Coast, and most other areas in between. Their modified diet selections include diabetic, reduced fat/reduced sodium, and easy-to-chew meals. Meals On Wheels provides a safety net for seniors, annually visiting over 3,000 seniors to ensure their welfare and provide referral services as needed. CSTC members have always been extraordinarily generous, and I expect this year will be no different as this is a very important cause to our community.

In addition to supporting this wonderful organization, we will have **live entertainment** by The Players, a live band that includes Kevin McCully, one of our very own San Diego Chapter members. The Players cover every genre of music so there will be something for everyone, and hopefully even some dancing! I am really looking forward to hearing them.

Finally, as this is my final message as Chapter President, I want to **thank all of you** for making this group such a wonderful organization. We really have a special group, and it is because of all of you. It has been an honor and a privilege to serve you.

Wishing you a wonderful holiday season.

Tony

Tony Applebaum
Chapter President

FREE QUICKFINDER

San Diego Chapter CSTC members will receive a Free copy of 2006 QuickFinder Handbook if:

1. Member attended at least four San Diego Chapter Dinner Meetings in 2006, (May-November) and
2. Registered by December 1, 2006 for the "1040 Running Start" Seminar to be held in San Diego on January 10 or 11, 2007.

If you previously purchased the QuickFinder but qualify for a free QuickFinder you can contact Tom Groel **by December 1st** to cancel your order.

Tom Groel
2234 Fletcher Parkway, Suite A,
El Cajon, CA 92020
Phone: 619-698-9191 • Fax 619-698-9199
Email: tomtaxman@gmail.com

OUR CHAPTER NEEDS VOLUNTEERS WE NEED VOLUNTEERS - DON'T BE SHY

Members are need to get involved in committees and learn from the "veterans". The chapter cannot continue to grow and provide the benefits to the members without more members getting involved. We simply do not have enough members contributing time to the chapter's activities. Without volunteers, we will not continue to be a successful chapter.

Members who have been on committees but have had some time off are also encouraged to volunteer again.

Please contact a chapter officer or a member of the Board of Directors to offer your help.

BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is **Friday December 8, 2006, 10:00 A.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.

MEMBER RECOVERING

Jim Quinlan, a long time member of the San Diego chapter and a current member of the board of directors is recovering at home after being in the hospital. Jim will not be able attend the Holiday Party.

Send your "Get Well Quickly" wishes to Jim via email to quinlan@sbcglobal.net.

1040 RUNNING START Federal & California Update

CTEC credits - Federal-6 hrs, State-2 hrs

Speakers: Dave Gorsich, EA & Mike Karll, EA

San Diego **Wednesday January 10, 2007**

Thursday January 11, 2007

Contact: Randy Dahlin
(619) 697-3000

North County **Saturday January 6, 2007**

Contact: Joanne Schroeder
(760) 740-0582 x 104

East County **Tuesday January 9, 2007**

Contact: Joe Foti
(619) 465-4739

Price (lunch included)

\$160.00 Members to December 18, 2006

\$175.00 Non-members to December 18, 2006

\$175.00 Members after December 18, 2006

\$195.00 Non-members after December 18, 2006

\$200.00 All walk-ins

QUICKFINDER & THE TAX BOOK

Special Prices for CSTC Members

Order Must be Received by **December 1, 2006**

The order form is available at our website
www.cstcsandiego.org or contact Tom Groel
(619) 698-9191 or email tomtaxman@gmail.com.

ENROLLED AGENTS RENEWAL

Enrolled agents with social security numbers ending in 0, 1, 2, or 3 must renew their active status by **January 31, 2007**.

Applications for renewal were recently mailed to the affected enrolled agents. The renewal fee is now \$125.00.

JANUARY NEWSLETTER

The deadline for articles and ads for the January 2007 issue is Jan. 15, 2007.

The January issue is scheduled to be posted to the chapter's web site by Jan. 20.

The deadline for articles and ads for the May 2007 newsletter is April 25, 2007.

No newsletters in February, March and April.

EDUCATIONAL INCENTIVES

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

At each San Diego chapter dinner meeting in 2006 five 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:

- A The member must attend one of the following:
- San Diego Chapter's Running Start Seminar held in January 2007, or
 - 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

The reimbursement form is available on the chapter's website www.cstcsandiego.org and from the chapter office.

Submit the reimbursement form by December 15, 2006
to receive your rebate!

FREE DINNER FOR SPONSORED GUESTS

Invite other tax professionals you know to come to a dinner meeting for free. A current San Diego chapter member may bring a guest to dinner one time at no charge to the May through November dinner meetings.

Requirements:

- Guest must be a tax preparer
- First time to chapter meeting

Also tell them to register for the 1040 Running Start Seminar. (Not a freebee)

IRS DIGITAL DISPATCH & E-NEWS

The Digital Dispatch and e-News for Tax Professionals, two e-mail newsletters from IRS that cover tax news of interest to the tax professional will merge effective 4 December 2006.

If you presently subscribe to either service you are not required to take any action. The IRS system will automatically merge all subscribers.

If you are not presently a subscriber, to subscribe to *e-News For Tax Professional*:

- (1) go to www.irs.gov,
- (2) select the "*Tax Professionals*" link near the top of the page,
- (3) select "*Subscription Services*" link on the left,
- (4) select "*Join e-News For Tax Professionals*",
- (5) Read the instructions and the "Caution" note
- (6) Input the information requested.

CTEC – CSTC REPRESENTATIVE

Mr. Jim Wright, a member of the North County Chapter, has been recently appointed as the CSTC representative to CTEC.

Members needing CTEC information or wanting to make a suggestion to the CTEC board should contact Jim at 760-746-3880 or e-mail jimwright1@cox.net.

BUSINESSES TELEPHONE EXCISE TAX REFUND

IRS has announced the procedure for Businesses to claim the federal telephone excise tax refunds, (IR-2006-179, Nov. 16, 2006).

Options for requesting this refund vary for sole proprietors, who file a Schedule C with the Form 1040, depending on the gross income reported on the Schedule C.

Detail information is on the IRS web site at www.irs.gov/newsroom/article/0,,id=164305,00.html. Be sure to look at the "related items" at the bottom of the web page.

IRS TAX TALK TODAY

Visit the *Tax Talk Today*, www.taxtalktoday.tv/, web site archive to view the November 14 show on "Electronic IRS", other programs and read valuable information located in the Resource section.

The next show will air on Tuesday, December 12, at 2:00 p.m. ET. The topic is "Getting Ready for Filing Season 2007 (Part 1 - Individuals)."

QUICKFINDER SEMINAR

The annual South Bay Chapter Quickfinder seminar will be held in January 2007.

Details are not available at this time. Information will be posted to the San Diego chapter's web site.

CHAPTER'S WEBSITE

Visit the San Diego Chapter's website at www.cstcsandiego.org for breaking tax news, educational events, Internet resources for use in your tax practice and other tax related information.

Let us know if you have any suggestions for the website. Email your ideas to larry@taxnewsandtips.com.

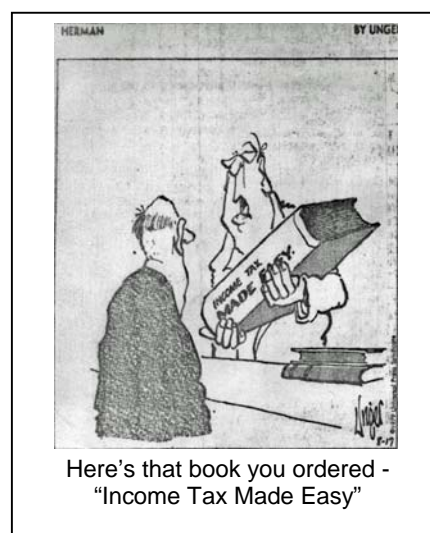
Visitors To Chapter's Web Site

July - 467 August - 447 September - 560
October - 488 November - 455

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.



"The most discouraging thing about being a bread winner is that the tax collector gets such a big slice."

Jack Moffit, LA Evening Herald-Examiner

SAN DIEGO CHAPTER

OFFICERS

President

Tony Applebaum

(619) 237-7290

E-mail: tony@appletaxgroup.com

1ST V.P. – Education & Speakers

Rose Carter – Running Start Seminar

(619) 698-0508

E-mail: racarter@sbcglobal.net

2ND 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: duanetaxman@gmail.com

BOARD OF DIRECTORS

Past President –

Government Affairs/IRS Liaison and Elections

Val Daigle

(619) 435-3131

E-mail: val@westax.com

Memberships

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

E-mail: nadine8@san.rr.com

Newsletter Editor

Terry Smith

(619) 283-8055

E-mail: realtaxes@aol.com

Hall of Fame

Shirley Henry-Bisantz

(602) 224-9038

E-mail: shirley@kachinaranch.com

Director

Mari 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@juno.com

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



BREAKFAST MEETINGS

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

San Diego Chapter — 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 call him at 619-435-3131.

East County Chapter — 1st, 3rd & 5th Thursdays at Coco's 5550 Lake Murray Blvd, La Mesa. @ 7:30AM Contact Maryann Shefveld at 619-464-1260, email: Taxster@aol.com.

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 — 2nd & 4th 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.

YOU ASKED

Attendance at our 2006 meetings and classes has been as follows:

June dinner meeting	85
July dinner meeting	105
August dinner meeting	97
September dinner meeting	105
September Mini Symposium	106 (42 & 64-2 day)
October dinner meeting	106
November dinner meeting	85
Running Start Pre registration	120

The San Diego Chapter currently has 207 members.

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.
- **CSTC SOCIETY OFFICE:**
2050 W Chapman Ave # 114
Orange, CA 92868-2648
Tel (714) 634-0484 • Fax (714) 634-4975
Web Site: www.cstcsociety.org.
E-mail: cstcsociety@sbcglobal.net

SAN DIEGO CHAPTER NEWSLETTER

Newsletter via Email

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. If you change you email address please notify Larry.

Newsletter Articles & Advertising

Submit your articles and ads to Terry Smith (619) 283-8055 or email to Realtaxes@aol.com. Include in emails the Subject "CSTC – AD" or it won't be opened.

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

The deadline for articles and ads for the January 2007 issue is Jan. 15, 2007.

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.

CLASSIFIEDS

AVAILABLE: 15 years experience handling all types of tax returns. Tim Doremus (619) 414-8046.

OPENING: Small friendly East County office has immediate opening. 2+ years tax preparation and Accounting Skills required. Duties include preparing individual and corporation returns and accounting. Fax resume to (619) 444-2675.

ENROLLED AGENT needed for expanding La Mesa tax and accounting office. Salary commensurate to experience. Fax resume to (619) 462-9800.

WANTED: Fast-paced, high volume La Mesa office seeks tax professional with a minimum 3 years experience. Excellent opportunity with growth potential. Fax resume and cover letter to (619) 698-9767 or email to smc500@cox.net

BOOKKEEPING/TAX PREPARATION: Get organized. Reliable, Professional and Personalized service for Bookkeeping/Tax Preparation. QuickBooks, Quicken, Lacerte and ProSeries. Please contact Milan @ (858) 688-1800 or mgr@bzgrp.com

HELP WANTED: Tax professional (EA preferred). Full-time Jan-Apr, part time May-Dec. Experience required. Send resume to G.R. Ward Fax (619) 475-8347 or e-mail benward@cox.net

WANTED-TAX PRACTICE. I am interested in purchasing a practice or part. Call Kevin (619) 507-7529.

WANT TO DOWNSIZE OR SEMI-RETIRE?

I would like to expand my Mission Valley practice (across from Qualcomm). Terry (619) 283-8055.

TAX PRACTICE WANTED. Multipractitioner office in La Mesa desires to purchase tax practice or portion of someone's practice, if downsizing. Also looking for an assistant preparer/data entry person. Contact Steve Comer or Michael Grossman (619) 698-0202.

BOOKKEEPING & PAYROLL: CSTC member and QuickBooks ProAdvisor can help your clients prepare for tax time now. Why wait until January? Call Debbie Ashlock (619) 523-0240 or visit www.wnllgroup.com.

INTUIT – POSITIONS AVAILABLE: Software company and maker of Turbo Tax, is hiring experienced tax preparers to join our growing team of seasonal tax professionals to work with Personal Pro. Must have professional experience preparing business or individual tax forms and be comfortable working with TurboTax and other software while speaking with customers. CPA or EA certification highly desired. Please send a word document of your resume to Lindsay_Birtcil@intuit.com and reference Personal Pro Tax Professional.