

**California Society of Tax Consultants
San Diego Chapter Newsletter • November 2008**

Dinner Meeting

Date Thursday, November 20th, 2008

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

Times 5:00 p.m. Registration & Social
5:30 p.m. Speaker
6:30 p.m. Social/Dinner
7:00 p.m. Dinner
7:30 p.m. Speaker continues

Cost \$20 - Members with Reservations
\$28 - All Others

Menu

- Pork Loin
- Salad, Chef's choice
- Duchess Potatoes
- Dessert, Chef's choice
- Choice of Coffee, Tea, Iced Tea
- **Vegetarian Meal Is Available**

Requests must be made with reservation



RESERVATIONS

Deadline is **Noon Wednesday November 19th, 2008**

On line at www.cstcsandiego.org/is-res.htm,
or call 619 698-0508, or

Email Rose Carter at racarter@sbcglobal.net.

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

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

Confirmation of your on-line dinner reservation will
be emailed to you within 72 hours. Reservations made
on Thursday thru Sunday are scheduled to be confirmed
the following Monday. If you do not receive a
confirmation please call 619 698-0508.

See the "No-Show" dinner reservations policy on
page 3.

**CHAPTER ELECTION AT
NOVEMBER MEETING**

(See Page 4)

VETERANS DAY NOVEMBER 11TH



ENJOYING YOUR FREEDOM?

HUG A VETERAN TODAY AND TOMORROW

EDUCATION PRESENTATION

***"Financial Matters In
This Current Economy"***

Speaker - Scott Davis

CTEC 1000-CE-2559

(2 FEDERAL CREDIT HOURS)

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.

CSTC MISSION STATEMENT

To promote professionalism by providing quality educational events for tax professionals, by creating and encouraging networking opportunities for members and by advocating professional standards and positions within the tax industry.

PRESIDENT'S MESSAGE

Dear Friends & Colleagues,

I want to thank Lynn Freer for the excellent presentation she gave on the California Updates at our October meeting. This was very informative education session and a wealth of knowledge that will be very useful in the preparation of this upcoming tax year. Thanks Again.

Our November speaker will be Scott Davis and he will speak on "Financial Matters in this Current Economy". We look forward to hearing him.

Remember that our "**Holiday Party**" meeting will be held on **December 11th (2nd Thursday)**. Dinner and dancing to the tune of "**The Players**", which one of our very own members, Kevin McCully is part of. We had a great time last year and are looking forward to another wonderful fun filled evening of winding down the year with fun and spirits.

As we are heading towards another year, we do need your support to keep our chapter afloat. Please remember that it takes all of us to make a sound chapter. Please contact any of the Board on the back page to volunteer some time.

We are making strides with the new members that have joined this past 2 months, but we have also lost members due to retirement or health reasons. We have had a couple members that have passed away and Barbara Martin just passed away in September.

A big thanks to Terry Smith our editor and Larry McClellan our website expert for their contributions to our newsletter and website.

See you all at the next meeting.

Rose Carter, Chapter President

"1040 Running Start Update" Seminar

January 8 & 9, 2009

See Page 8



LEST WE FORGET OUR HEROES

You're an 18 or 19 year old kid. You're critically wounded and dying in the jungle in the la Drang Valley, Vietnam 11-14-1965.

Your infantry unit is outnumbered 8-1, and the enemy fire is so intense from 100 or 200 yards away, that your own Infantry Commander has ordered the Medi-Vac helicopters to stop coming in. You're lying there listening to the enemy machine guns, and you know you're not getting out.

Your family is ½ way around the world, 12,000 miles away, and you'll never see them again. As the world starts to fade in and out, you know this is the day. Then over the machine gun noise, you faintly hear the sound of a helicopter and you look up to see a Huey, but it doesn't seem real, because no Medi-Vac markings are on it.

Ed Freeman is coming for you.

He's not Medi-Vac, so it's not his job, but he's flying his Huey down into the machine gun fire, after the Medi-Vacs were ordered not to come. He's coming anyway.

And he drops in, and sits there in the machine gun fire, as they load 2 or 3 of you through the gunfire, to the Doctors and Nurses.

And he kept coming back...13 more times...and he took about 30 of you and your buddies out, who would never have gotten out.

Medal Of Honor Winner Ed Freeman died September 18, 2008 at 80 in Boise, ID.

GOD BLESS ED FREEMAN!

Verified thru Department of Defense website.

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.

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.

2008 MEETING DATES

December 11 (2nd Thursday)
Holiday Party

Non Profit Group Polinsky Children's Center
Music by "The Players"

CHAPTER 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 McClellan at cstcsd@san.rr.com.

The chapter's website contains the forms for Running Start, QuickFinder, The Tax Book and other seminars.

ATTENDANCE

May Dinner Meeting	87	(2007-102)
Pre-Paid Dinners	44	(2007-52)
June Dinner Meeting	95	(2007-84)
July Dinner Meeting	83	(2007-92)
August Dinner Meeting	109	(2007-96)
September Dinner Meeting	87	(2007-97)
October Mini Symposium	58	(2007-96)
October Dinner Meeting	142	(2007-126)

QUICKFINDER & THE TAX BOOK NOTICE

The 2008 Chapter Member Benefits, which have been published monthly, were adopted on April 24, 2008. See page 9 for complete member benefits.

The benefits do **NOT** include a free QuickFinder or The Tax Book.

Order forms are available at the chapter's website or from Tom Groel at tomtaxman@gmail.com or 619 698-9191. **Orders must be received by December 1, 2008.**



BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is **Thursday November 20th, 2008, 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 Rose Carter at (619) 698-0508 or e-mail: racarter@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 cstcsd@san.rr.com. Let us know if you change you email address.

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 December 2008 issue is November 25, 2008.

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. Charge is per six lines or portion thereof. Subject to available space and the discretion of the editor.

**NOMINATIONS - 2009
SAN DIEGO CHAPTER OFFICERS
& BOARD OF DIRECTORS**

Election of Officers and Board members will be by hand vote at the November dinner meeting. You must be present to vote.

Nominations:

President	Greta Ward
1 st VP	Stephanie Matticks
2 nd VP	Terry Smith
Secretary	Mari Jo Hughes
Treasurer	Duane Lewis

Board of Directors

Nadine Allevato • Val Daigle • Linda Farmer
Shirley Henry-Bizantz • Marc Lord

**TWO AREA CODES FOR
NORTH SAN DIEGO COUNTY**

Area Code 760 – **UPDATE**

Existing phone numbers in the 760 area code region will keep their existing area code. Starting in May 2009 new phone numbers in North San Diego County will be assigned the new 442 area code.

On October 16th the California Public Utility Commission made its final decision reversing its prior ruling to split the area into two area codes.

**IRS AUDITS
QUALIFIED MORTGAGE INTEREST
DEDUCTIONS**

The San Diego Enrolled Agents chapter of CSEA will have an IRS Auditor at the chapter's Tuesday November 11th dinner meeting speaking on IRS Audit of Qualified Mortgage Interest Deductions.

Patricia Feldman from the IRS would appreciate if you could put questions you have in writing. Please forward your questions to Elaine Smith at eztaxes@sbcglobal.net by Friday, Nov. 7th. Your questions will forward to Patricia to include in her presentation for more efficient use of her time. Thanks, Steven Leibold, President, CSEA San Diego Chapter.

Reservations: Call San Diego Chapter of CSEA at 800-642-1040 or e-mail paulatax@san.rr.com by 5:00 pm Thursday, November 6th - Cost with timely reservation is \$27 for members of CSEA; \$33 for Non-members (i.e. CSTC members). Late reservations and at the door cost are \$37. Their website is www.cseasandiego.org.

The meeting is at the Handlery Hotel. Registration is at 5 PM, speaker begins at 5:30 and dinner at 6:30.

**IN MEMORY
Barbara Martin**

Barbara passed away August 15th, she had been a CSTC member since 1994. Barbara also served this Chapter as a member of the Board of Directors.

CALIFORNIA ESTIMATED TAX CHANGES

For tax year 2009 estimated taxes will need to increase the first two payments from 25% to 30%, the final two payments will be at 20%, to avoid the California underpayment of estimated tax penalties.

FREE CALIFORNIA TAX NEWS SERVICE

Spidell Publishing Inc. is offering a free e-mail service to receive California tax news and important alerts during the filing season. Register on-line at www.caltax.com select "Flash E-mail".

**REAL ESTATE TAX DEDUCTION FOR
NON-ITEMIZERS**

Individuals who do not itemize, Schedule A, will be allowed to increase their standard deduction by the amount of real property taxes paid in 2008.

The deduction is limited to \$500 for a single taxpayer and \$1,000 for joint filers. California has not conformed to this Federal law. (*Housing Assistance Tax Act of 2008 (P.L. 110-289)*)



BIG SPEEDY RECOVERY TO JACK YODER

Jack Yoder has been hospitalized at Scripps after being struck by an automobile.



NOVEMBER ANNIVERSARIES

NADINE ALLEVATO	30 YEARS
ROSE CARTER	10 YEARS
JOHN CHRYSLER	19 YEARS
RANDY DAHLIN	20 YEARS
DONALD DE GREEF	14 YEARS
JIM DUEWEKE	11 YEARS
LEE ERMIS	15 YEARS
WILLIAM FIELDS	25 YEARS
CHRISTINE GAUNCE-FLEMING	19 YEARS
JODIE HERZIG	7 YEARS
MICHAEL HOFFMAN	27 YEARS
MARI JO HUGHES	13 YEARS
GAIL ANN KERNA	19 YEARS
EDWARD LINDGREN	21 YEARS
SHARA MICHETTI	23 YEARS
JANIN MILLER	12 YEARS
JAMIE MURRELL	2 YEARS
VICKI PIEPER KLEPIN	5 YEARS
DONNA TELLO	23 YEARS
DIANA TILLEY	9 YEARS
PATRICIA URBAN	7 YEARS
CHUCK WOODSON	23 YEARS

A TOTAL OF 354 YEARS

We thank you for your loyalty to the
San Diego Chapter making us 187 strong.

WELCOME NEW MEMBERS

DEBBIE ASHLOCK BIRD
JEWELL GOODRIDGE
PEGGY HARRISON
JANICE LINDSLEY
ALAN SPIEGEL
ELLEN TAJBAKSH
JUDITH VAN GAASBEEK

*"Income tax has made more liars out of the
American people than golf."
Will Rogers*

FTB TAX NEWS – November 2008

2008 State Income Tax Rates Adjusted for Inflation

The Franchise Tax Board (FTB) announced that the 2008 state tax brackets have been adjusted for inflation using a process called "indexing." "By indexing the tax rates, a California household with unchanged income will pay 5 percent less in State income taxes," said State Controller and FTB Chair John Chiang.

The state is adjusting the tax brackets, filing requirement thresholds, the standard deduction, and certain credits based on the inflation rate of 5.0 percent, as measured by the California Consumer Price Index for all urban consumers from June 2007 to June 2008. Last year's inflation rate measured 3.1 percent.

San Jose tax preparers sentenced for tax fraud

A San Jose-based tax preparer and his assistant were sentenced to county jail for aiding and abetting his clients to file fraudulent state income tax returns.

Jeff R. Welch, 62, of Gilroy, owned and operated Accountable Financial Services with Joy Ramoran, 32, of San Francisco, employed as his assistant. Welch was sentenced to four months in county jail and Ramoran was sentenced to 60 days. In addition, both were ordered to pay FTB restitution of more than \$90,200. As part of his three-year probation, Welch was also ordered to not assist in the preparation of tax returns on behalf of his clients.

According to court documents, between 2000 and 2004, the pair prepared and filed false tax returns that claimed fraudulent or fraudulently inflated Child and Dependent Care Credit Expenses. The false credits generated increased refunds on behalf of their clients. In one instance, Welch electronically filed a client's return and claimed the head of household filing status with one dependent. In reality, the client was married with two children neither of whom was in daycare. Welch and Ramoran benefited from an increase in the number of clients and from charging fees for form preparations that were not required.

This case was discovered by FTB's internal fraud detection program.

IRS COMPLIANCE & ENFORCEMENT FY 2008

California Man Who Could “Fix” IRS Problems Sentenced to 18 Months in Prison

On June 25, 2008, in San Francisco, Calif., Fatai Onevai was sentenced to 18 months in prison for preparing false tax returns. Onevai pleaded guilty in March 2008. According to his plea agreement, beginning in 2000, Onevai, operated O Fix Enterprise out of his home in Pittsburg, California. Through O Fix Enterprise, he offered tax preparation, roofing and construction services. Onevai was charged with 37 counts of preparing false and fraudulent Income Tax Returns for taxpayers. He made approximately \$1.3 million in false claims related to filing status and exemptions.

Many returns done by unlicensed paid preparers are riddled with errors, according to Treasury inspectors who made undercover visits to 28 such preparers. 61% of the returns contained mistakes, and in a third of those cases, the preparers acted recklessly, for example adding in deductions the taxpayer wasn't entitled to or claiming dependents erroneously. One of the problem preparers Treasury visited prepared over 700 actual returns for taxpayers during the most recent filing season.

This gives a lift to a bill forcing unlicensed preparers to register with IRS. (Kiplinger Tax Letter)

SAN DIEGO AREA TAX RETURN PREPARERS PERMANENTLY SHUT DOWN BY FEDERAL COURT

WASHINGTON – A federal court in San Diego has permanently barred COA Financial Group, Eagle Financial Services, Roosevelt Kyle and Rebecca Tyree from preparing tax returns for others, the Justice Department announced today. The United States sued Tyree and Kyle and their businesses in November 2007, alleging that they prepared fraudulent tax returns for customers. In February of this year the court preliminarily enjoined Kyle from preparing tax returns.

Orders permanently enjoining Kyle, COA Financial Group and Eagle Financial Services, were signed by Chief Judge Irma E. Gonzalez of the U.S. District Court for the Southern District of California in July and September of 2008. Judge Gonzalez signed the permanent injunction against Tyree Wednesday.

The permanent injunction order against Kyle noted that the Internal Revenue Service (IRS) examined more than 200 returns prepared between 2002 and 2007 by

Kyle, COA Financial Group and Eagle Financial Services. All but approximately eight of those returns understated the customer's tax liability. The court found that COA Financial Group and Eagle Financial Services “intentionally and/or recklessly understated customers' tax liabilities by including fabricated or inflated deductions” on their returns.

The court noted that in 2007 Kyle fabricated deductions for employee business expenses and charitable contributions on a tax return he prepared for **an undercover IRS agent posing as a customer**. The court said the IRS estimated that Kyle, COA Financial Group and Eagle Financial Services caused tax losses totaling \$18 million.

STIMULUS CHECKS

WASHINGTON — The Internal Revenue Service is looking for taxpayers who are missing more than 279,000 economic stimulus checks totaling about \$163 million and more than 104,000 regular refund checks totaling about \$103 million that were returned by the U.S. Postal Service due to mailing address errors.

“People across the country are missing tax refunds and stimulus checks. We want to get this money into the hands of taxpayers where it belongs,” said IRS Commissioner Doug Shulman. “We are committed to making the process as easy as possible for taxpayers to update their addresses with the IRS and get their checks.”

It is crucial that taxpayers who may be due a stimulus check update their addresses with the IRS by Nov. 28, 2008. By law, economic stimulus checks must be sent out by Dec. 31 of this year. The undeliverable economic stimulus checks average \$583.

IRS TAX FORUM

The 3-day IRS Nationwide Tax Forum held at the Town County in September drew 1792 Preparers. The six sessions drew 13,362 nationwide.

“You are the only problem you will ever have.
And you are the only solution”
Bob Proctor

CLASSIFIEDS



OFFICE SPACE AVAILABLE – We have 2 rooms available 1 – 10 X 10 and 1 – 12 X 16 conference room. Each room includes a computer, Internet access (our computer or yours), client seating and is professional looking. We are offering them by the hour (20 hours per month min; additional available for modified rent). Rent is \$250 per month for up to 20 hours of use. **NO LONG TERM COMMITMENTS REQUIRED.** You'll also receive 1 voice mailbox, mail service, and T-1 Internet. Copier (color & b/w), fax, printer, secretarial services available at additional cost. Ideal for small practitioner that doesn't need full time office space, but wants some place professional to meet with their client. Call Steven Leibold at 619 294-4286 X351 or e-mail sleibold@sdbizadv.com.

OFFICE SPACE NEEDED! Looking for 500 to 750 Square feet of office space in North San Diego Co., particularly Carmel Valley or Del Mar. Open to PQ, RB, Rancho Santa Fe and coastal communities. E-mail davemorgancpa@sbcglobal.net or 619 884-5449.

OFFICE FURNITURE: 2 two-drawer locking lateral files, light grey, extra sturdy. Tall bookcase with adjustable shelves, oak (70"high x 25" wide x 10" deep) and 3 two-shelf bookcases with fixed shelves (28" high x 20" wide x 10" deep). Not even out of boxes. Sylvia Lang at 619 670-1186 or sklangtax@aol.com.

TAX PRACTICE WANTED TO BUY: Wishing to expand Mission Valley practice (son needs more work) Terry Smith at 619 283-8055 or Realtaxes@aol.com.

FOR SALE: Corner desk with returns on each side. Contact Maryann at 619 464-1260.

OFFICE SPACE: Small tax and/or bookkeeping practice in East County. 200sq ft private office, share lobby and conference room. Covered parking. Ted Gronich 619 966-9996 or email taxguru@gbts.sdcoxmail.com.

OFFICE SPACE: – San Diego/Balboa Park Area. 2 professional offices are available to sublease. Immediate availability Anthony Applebaum at 619 237-7290 or tony@appletaxgroup.com

IMMEDIATELY AVAILABLE: Share space with three EA's in the Clairemont area. Reasonable cost per sq. ft. plus share in utilities and common areas. Kitchen and storage available and remodeled lobby area for clients. Close to 805 Fwy and Balboa. For details and a tour at 858 277-8780 or Elaine@horizonplanning.com.

OFFICE SPACE FOR RENT: Experienced preparer to share space and Lacerte. 8x10 office with window. Available now. 4858 Mercury, Kearny Mesa. Terry Davis at 858 277-1040 or terrydavistax@sbcglobal.net.

EA SEEKING TAX PRACTICE: EA/CFP expanding business. Year-round office, full time staff, tax and financial planning firm. Flexible terms. John Sutherland @ 619 464-8474.

SPACE FOR RENT: - Fletcher Hills: For an Independent Tax Office, join the tax offices of: Sylvia Lang, Diane Reyes, Phyllis Roth, and Maryann Shefveland (each an independent) but share information, reception/waiting room. Immediate availability. 619 670-1186 or 619 464-1260.

FOR SALE: 4 - 4 Drawer, black, vertical filing cabinets - excel condition; 1 - black, fire safe, one drawer, file cabinet; 5 shelf, cherry & black wrought iron book shelf; small reception desk, blond, solid wood; 4050 Laser Printer and 3 cartridges. Apará at 760 436-1296 or e-mail apará@sbcglobal.net.

TAX PRACTICE WANTED TO BUY: EA seeking tax and/or bookkeeping practice. Call Tony Applebaum at 619 237-7290.

PADRES PERSONAL SEAT LICENSE Two seats in the Premium, Founders Club directly behind home plate. Offer is for the seat license only--annual full season ticket purchase for two is separate from the seat license Val@westax.com.

TAX EDUCATIONAL EVENTS

Registration Forms and additional information at www.cstcsandiego.org.
Also check out other educational events in San Diego County

"A Complete Guide for Reporting Foreclosures, Debt Cancellation, Short Sales & others"

CSTC SOUTH BAY CHAPTER

PRESENTS 2008 MINI SEMINAR – CE 6 hrs Federal

Tuesday November 11th 8:30 am – 3 pm

Speaker: Lisa Ihm, EA

619 420-4740 Lucy Valdes (NO WALK IN'S)

Registration forms are available on the San Diego chapter's website.

December 3 & 4

CSTC "TAX BRIDGE TO 2008"

Location: Anaheim Plaza Hotel

Presented by the

California Society of Tax Consultants

More information and registration form at

www.cstcsociety.org/whatnew.htm.

"1040 Running Start Update" Seminar

The Best Federal & California Income Tax Update
in San Diego County 8 hours CE

January 8 & 9, 2009 (Thursday & Friday) - in San Diego

January 10, 2009 (Saturday) - in Escondido

January 6, 2009 (Tuesday) - in El Cajon

Registration Forms – available at Chapter's Website

East County Chapter: www.cstceastcounty.org

Dinner meeting 1st Tuesday 6 PM at El Cajon Community Center.

North County Chapter: www.cstcsociety.org/NORTHCTY

Dinner meeting 2nd Thursday at Olympic Resort Hotel.

San Diego Chapter: www.cstcsandiego.org

Dinner meeting 3rd Thursday 5:30 PM at Handlery Hotel, Mission Valley.

1/08/09 - ***Running Start Seminar***. Dave Gorsich and Mike Karll. 8 hours CE.

1/09/09 - ***Running Start Seminar***. Dave Gorsich and Mark Karll. 8 hours CE.

South Bay Chapter: www.cstcsociety.org/SOUTHBAY

Dinner meeting 4th Tuesday 6 PM at Anthony's Chula Vista.

Temecula Chapter: www.cstcsociety.org/TEMECULA

Dinner meeting 1st Wednesday 5:30 PM at Boston Billies.

South Orange County: Dinner meeting 4th Tuesday 5:30 PM at Marie Callender's

San Juan Capistrano. POC Haydee Robinson (949) 361-9373

Fiduciary Tax Group:

11/13 – Issues of GST. Val Daigle

12/11 – New Inherited IRA Distribution Rules. Larry Lloyd

Society Classroom series: sessions and topics throughout California at www.CSTCsociety.org Classroom series

FREE Federal and State E-Service Workshop at www.ftb.ca.gov/emailapp/efile_services.asp

— 2008 CHAPTER MEMBER BENEFITS —

1. At both the May and June Chapter Dinner meetings, of members attending, a drawing for a free Running Start registration OR two (2) sessions of the Chapter Mini symposium Special Interest Classes OR the Chapter's two-day Mini Symposium Case Study Classes registration (members choice). Member must be in attendance to be eligible.
2. Attend at least four (4) Chapter Dinner Meetings between May and September and receive a 50% discount off the San Diego Chapter Running Start registration **on full fee.**
3. The Monthly Chapter Dinner Meeting will cost \$20.00 for Members with reservations and \$28.00 for Members without reservations and Guests. Pre-Paid Dinner Meetings cost shall be **\$125.00.** (Chapter cost is \$27.50 per person).
4. Two Name Badge Drawings will be held during each monthly meeting May – October 2008 (except July) for Education Certificates worth \$25.00 good toward any education event presented by the San Diego Chapter only. Eligible events include Monthly Dinner meetings (non Pre-paid Annual dinner fee), Fall Workshop (General or Special classes), or Running Start (not Early Bird Special Discount). Coupons will be valid May 2008 through December 31, 2009 only. No exceptions. (Coupons have no cash value and are not convertible to cash or refunds for previously paid event fees.)

NOTE: NO FREE QUICKFINDER or THE TAX BOOK FOR 2008.

SAN DIEGO CHAPTER COMMITTEES

Our Chapter is the largest in California (currently 208) because of you, our fellow members. However, we all need a little bit of help now and then. The following committees make this Chapter function. Please call any of these Committee Chairs to offer your help:

Anniversary Party	Stephanie Matticks	Member of the Year	Duane Lewis
Arrangements	Stephanie Matticks	Membership	Mari Jo Hughes
Audit	Rick Wagner	Mini Symposium	Greta Ward
Awards			Linda Farmer
Dinner Speakers	Greta Ward Stephanie Matticks	Newsletter	Terry Smith
Elections	Christy Almond Andrea Davis	Nominations	Tony Applebaum
Finance/Budget	Duane Lewis	Operation Manuel	Shirley-Henry Biszantz
Government Affairs	Val Daigle	Quickfinders/Tax Book	Tom Groel
Hall of Fame	Shirley Henry-Biszantz	RIA Books	Marianne Lindsay
Holiday Party	Mari Jo Hughes	Running Start	Marc Lord
		Sunshine	Nadine Allevato
		Website	Larry McClellan

SAN DIEGO CHAPTER

OFFICERS

President

Rose Carter

(619) 698-0508

E-mail: racarter@sbcglobal.net

1ST V.P. – Education & Speakers

Terry Smith

(619) 283-8055

E-mail: realtaxes@aol.com

2ND V. P. – Dinner Meetings and Arrangements

Stephanie Matticks

(619) 697-2950

E-mail: stephanie007@sbcglobal.net

Secretary –

Linda Farmer

(619) 264-6070

E-mail: laftaxes@pacbell.net

Treasurer – Finance/Budget

Duane Lewis

(619) 698-9191

E-mail: duanetaxman@gmail.com

Past President

Tony Applebaum

(619) 237-7290

E-mail: tony@appletaxgroup.com

BOARD OF DIRECTORS

Nadine Allevato

(858) 901-4005 or (858) 549-9500

E-mail: nadine8@san.rr.com

Steve Comer

(619) 698-0202

E-mail: scomer@tax-wealth.com

Val Daigle

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E-mail: val@westax.com

Shirley Henry-Bisantz

(602) 224-9038

E-mail: shirley@kachinaranch.com

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E-mail: abacus1@juno.com

Newsletter Editor

Terry Smith

(619) 283-8055

E-mail: realtaxes@aol.com

Web Site

Larry McClellan

(858) 278-1164

E-mail: cstcsd@san.rr.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.

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

North County Chapter — Tuesday at 7:30 a.m. at I HOP at Hwy 78 and Shadowridge Dr. in Vista.
Contact Michele Meharis.

Fiduciary Tax Group — 2nd & 4th Thursday of each month at 7:30 am, at Coco's Restaurant, 5550 Lake Murray Blvd, La Mesa. Contact Janice 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:**
5262 Baltimore Dr
La Mesa Ca 91942-2080
Tel (619) 698-0508 • Fax (619) 698-9735
Web Site: www.cstcsandiego.org
E-mail: cstcsd@san.rr.com
- **CSTC SOCIETY OFFICE:**
12419 Lewis St #106
Garden Grove Ca 92840-4672
Tel (714) 750-2782 • Fax (714) 750-2722
Web Site: www.cstcsociety.org.
E-mail: cstcsociety@sbcglobal.net