

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

Dinner Meeting

Date Thursday, December 11th, 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

- Filet Mignon w/Drunken Shrimp
- Salad, Chef's choice
- Wild Rice Blend
- 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 December 10th, 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.

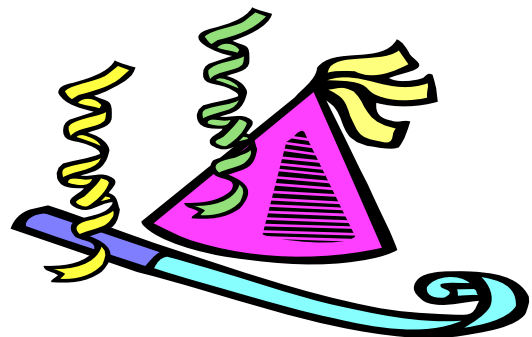
Confirmation of your on-line dinner reservation will
be emailed to you within 72 hours. Reservations made
on Thursday thru Sunday are scheduled to be confirmed
the following Monday. If you do not receive a
confirmation please call 619 698-0508.

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

HOLIDAY PARTY

DECEMBER 11TH

2ND THURSDAY OF DECEMBER



MUSIC BY "THE PLAYERS"

BENEFIT ORGANIZATION/CSTC CHARITY

POLINSKY CHILDREN'S CENTER

PLEASE BRING NEW UNWRAPPED TOYS

"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

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,

As we approach the end of another year and all the Holidays are nearing, I will be ending my two year position as President of CSTC San Diego Chapter. I cannot thank the Officers and Board of Directors enough for all the support they have provided me. To all Members, thanks to **ALL** for your kindness and support.

Shirley and Val, my thanks to you for the tremendous time you both have given towards our Member Benefits.

Larry and Terry, my thanks for all your time and expertise that you have given to create the best Chapter Newsletter and Chapter Website by far, and I have seen them all. You both should be very proud, as we are of you, for the professionalism you both portray in our newsletter and website.

Stephanie and Marc, my thanks for the admin work and the relationship you developed with the hotel staff, and keeping the members abreast of sign-ins and the smooth flow at every dinner meeting while tending to the whims of our members at each and every dinner meeting

Greta for all your time collectively obtaining all our guest speakers and providing us with professional education seminars through out the year and with the team of **Marc and Randy** doing our yearly Running Start. We strive to have quality and professional speakers at every educational function and you have all done a tremendous job.

Duane, my thanks, to our Treasurer, for keeping us on the straight and narrow with all of our financials where the buck starts and stops. A huge responsibility in keeping our records to the guidelines and requirements that our Society Chapter requires.

Linda, my thanks for providing us with the minutes of who said what ,why and how-come and making sure that the proper paper work was sent to our Society office in a timely manner.

Steve, Mari Jo, Nadine and Tony, my thanks for your hours of contribution of the behind the scene support where ever it was needed.

Congratulations to our new president elect, GRETA WARD. Please continue the strong support you gave

me as it is very much needed to maintain a sound organization.

Our "**Holiday Party- Dinner Meeting**" will be held on December 11th, all fun and **NO** speaker with dinner and dancing to the tune of "**The Players**", one of our very own members, Kevin McCully is part of. We had a great time last year and looking forward to another wonderful fun filled evening of winding down the year with friends, food, fun and spirits.

Safe and Happy Holidays to all and to your Families

Rose Carter, Chapter President

"1040 RUNNING START UPDATE" SEMINAR

January 8 & 9, 2009

See Page 8

2009 QUICKFINDER SEMINAR

Wednesday, January 14th 2009

See Page 8

TERRY SMITH - HOSPITALIZED

Terry Smith, our chapter's newsletter editor and Vice President was hospitalized on Thanksgiving. He has a major intestinal infection.

Your messages can be sent to Terry via email to realtaxes@aol.com and to his office at 3511 Camino Del Rio So #102, San Diego, CA 92108.

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.

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, RIA Federal Master Tax Guide, Mini Symposium, Quick Finder, and The Tax Book.

ATTENDANCE

	2008	2007
May Dinner Meeting	87	102
Pre-Paid Dinners	44	52
June Dinner Meeting	95	84
July Dinner Meeting	83	92
August Dinner Meeting	109	96
September Dinner Meeting	87	97
October Mini Symposium	58	96
October Dinner Meeting	142	126
November Dinner Meeting	77	91



DECEMBER ANNIVERSARIES

ANN BURKE	7 YEARS
JOSEPH CAVALLO	5 YEARS
JULIE DAHLIN	16 YEARS
DONALD DE GREEF	6 YEARS
MICHAEL FAINSTEIN	18 YEARS
KATHERINE FEATHER	9 YEARS
MICHELLE FREDERICK	9 YEARS
JOANN GLATTHAAR	7 YEARS
LISA IHM	1 YEAR
PEGGY LYNN	11 YEARS
RICHARD MALZAHN	25 YEARS
R PATRICK MICHAEL	3 YEARS
RUSSELL PLOWMAN	11 YEARS
WILLIAM RITTER	17 YEARS
CHERYL STANDARD	12 YEARS
RUSSELL TURNER	10 YEARS

We thank you for your loyalty to the San Diego Chapter making us 191 strong.

WELCOME NEW MEMBERS

JOSEPH DAHLIN
JEAN DOUGLAS
JANET FUNKHOUSER
JEWELL GOODRIDGE

THINK YOU'RE TOO OLD

Actor George Burns won his first Oscar at age 80.
Golda Meir was 71 when she became Prime Minister of Israel.

At age 96, playwright George Bernard Shaw broke his leg when he fell out of a tree he was trimming in his backyard.

Painter Grandma Moses didn't start painting until she was 80. She completed more than 1,500 paintings after that; 25 percent of those were produced when she was past 100.

Michelangelo was 71 when he painted the Sistine Chapel.

WHAT'S IN YOUR WALLET OF LIFE?



BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is **Thursday December 11th, 2008, 9:00 A.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 January 2009 issue is December 20, 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.

JANUARY 2009 NEWSLETTER

The deadline for articles and classified ads for our January 2009 issue of the chapter's newsletter is after Running Start, 20 January 2009.

MILEAGE RATES FOR 2009

Beginning on Jan. 1, 2009, the standard mileage rates for the use of a car (also vans, pickups, or panel trucks) will be:

- 55 cents per mile for business miles driven
- 24 cents per mile driven for medical or moving purposes
- 14 cents per mile driven in service of charitable organizations

The new rates for business, medical and moving purposes are slightly lower than rates for the second half of 2008 that were raised by a special adjustment mid-year in response to a spike in gasoline prices. The rate for charitable purposes is set by law and is unchanged from 2008.

The business mileage rate was 50.5 cents in the first half of 2008 and 58.5 cents in the second half. The medical and moving rate was 19 cents in the first half and 27 cents in the second half.

IR-2008-131, Nov. 24, 2008

TAX RELIEF FOR SO. CALIF. FIRE VICTIMS

FTB has announced payment and filing relief for people and businesses affected by the wildfires in the federally declared disaster areas.

California will match the postponement period announced by the IRS. This gives affected taxpayers who have tax returns, payments, or other time-sensitive acts otherwise due between November 13, 2008, and February 11, 2009, an automatic postponement to February 11, 2009, without added penalties or interest.

Earlier this week, the wildfires were declared a federal disaster in Los Angeles, Orange, Riverside, and Santa Barbara counties. Affected taxpayers are able to claim disaster losses in the current or prior tax year.

FTB Nov. 20, 2008

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.

The Order Deadline was December 1, 2008. Contact Tom Groel at tomtaxman@gmail.com or 619 698-9191 to see if he is still taking orders.

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 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 @ 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.

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

"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

2009 QUICKFINDER SEMINAR

Wednesday January 14th
Ruth Godfrey
3 Hours Federal & 3 Hours State CE

Lyzandra Castro (619) 420-4740
No Credit Cards

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:

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.

2008 SAN DIEGO CHAPTER COMMITTEES

Our Chapter is the largest in California (currently 191) 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	Newsletter	Terry Smith
	Stephanie Matticks	Nominations	Tony Applebaum
Elections	Christy Almond	Operation Manuel	Shirley-Henry Biszantz
	Andrea Davis	Quickfinders/Tax Book	Tom Groel
Finance/Budget	Duane Lewis	RIA Books	Marianne Lindsay
Government Affairs	Val Daigle	Running Start	Marc Lord
Hall of Fame	Shirley Henry-Biszantz	Sunshine	Nadine Allevato
Holiday Party	Mari Jo Hughes	Website	Larry McClellan

SAN DIEGO CHAPTER

2009 OFFICERS and BOARD OF DIRECTORS

President

Greta Ward

(619) 644-1752

E-mail: abacus1@juno.com

1ST V.P. – Education & Speakers

Stephanie Matticks

(619) 697-2950

E-mail: stephanie007@sbcglobal.net

2ND V. P. – Dinner Meetings and Arrangements

Terry Smith

(619) 283-8055

E-mail: realtaxes@aol.com

Secretary –

Mari Jo Hughes

(619) 397-5360

E-mail: johughes@pacbell.net

Treasurer – Finance/Budget

Duane Lewis

(619) 698-9191

E-mail: duanetaxman@gmail.com

Past President

Rose Carter

(619) 698-0508

E-mail: racarter@sbcglobal.net

BOARD OF DIRECTORS

Nadine Allevato

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

E-mail: nadine8@san.rr.com

Val Daigle

(619) 435-3131

E-mail: val@westax.com

Linda Farmer

(619) 264-6070

E-mail: laftaxes@pacbell.net

Shirley Henry-Bisantz

(602) 224-9038

E-mail: shirley@kachinaranch.com

Marc Lord

E-mail: mlord@htk.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:**
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Tel (619) 698-0508 • Fax (619) 698-9735
Web Site: www.cstcsandiego.org
E-mail: cstcsd@san.rr.com
- **CSTC SOCIETY OFFICE:**
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Garden Grove Ca 92840-4672
Tel (714) 750-2782 • Fax (714) 750-2722
Web Site: www.cstcsociety.org.
E-mail: cstcsociety@sbcglobal.net