

**California Society of Tax Consultants
San Diego Chapter Newsletter • June 2010**

Dinner Meeting

Date Thursday, June 17, 2010

Where ***NEW DINNER LOCATION***

Sheraton Mission Valley
1433 Camino Del Rio So
Mission Valley, San Diego
(More information on page 3.)

Times 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

Cost \$27 - Members with Reservations
\$32 - All Others

Menu

- Grilled Filet of Salmon
- Rice Pilaf
- Dessert, Chef's choice
- Choice of Coffee, Tea, Iced Tea
- **Vegetarian Meal Is Available**

Requests must be made with reservation

*******PRE PAY BY 6/17/10--\$160.00*******

RESERVATIONS

Deadline is Noon, Wednesday, June 16th, 2010

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 a Thursday are scheduled to be confirmed
the following Monday. If you do not receive a
confirmation please call (619) 698-0508

EDUCATIONAL PRESENTATION

Before & After Dinner

Topic

POST TAX SEASON PLANNING



Speaker

Wayne Otchis, CPA

Started Tax Practice 1975
Member Cal Society CPAs and CSTC
Speaker for Spidell Seminars since 1998
4 Beautiful Grandchildren
Still Doing 500 Returns annually....some right.

CTEC 1000-CE-2985

(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.

**NO-SHOW DINNER RESERVATIONS
BILLING POLICY**

See Page 5.

PRESIDENT'S MESSAGE

Dear Friends & Colleagues,

I missed being with you all at the May dinner meeting, but I had a very special occasion to attend. It was my grand daughter's wedding. And as a proud grandparent I have to say she looked gorgeous. Now I have catch up to do and we all know how that goes.

This month we have changed our meeting location to better serve you all. I am sure you will enjoy being at the ***Sheraton in Mission Valley***. And especially as Wayne Otchis is our dinner speaker. He is always so knowledgeable on his topics.

As I ask every month, and will continue to do so, we are still hoping that there will be some new brave people to step up to begin taking over board and committee positions. We members of the board are getting older, but hate to admit it. There is a need for younger members to step up to the plate with their bright ideas to start shaping the future of this great organization.

Now let us visit membership. We are still trying to attain our goal of 2012 by 2012. I realize we all lead very busy lives, but if you know other tax preparers that do not belong to CSTC, please invite them to a dinner meeting and discuss the benefits we receive from our membership. The net working that happens at these dinners, apart from the education is excellent. Possibly they will decide to become members. And who knows maybe future board members.

If you are interested in joining a committee or serving on the board please contact any of the board members listed in this newsletter. We will be delighted to hear from you. All our telephone numbers are listed.

Greta Ward, Chapter President

NEW MANAGER NEEDED FOR CHAPTER'S WEBSITE & EMAIL LIST

I will not be able to continue with updating the chapter's website & operating the chapter's email list because of other commitments.

If you or someone you know would be willing to take over managing the chapter's website &/or email list please contact me. Larry McClellan 858-278-1164, e-mail cstcsd@san.rr.com.

NEW REQUIREMENTS FOR FEDERAL TAX RETURN PREPARERS

Learn the Who, What, When and How
Presented by
IRS Small Business/Self-Employed Division

Date: June 9, 2010 (archived* for later viewing)
Time: 2 p.m. Eastern. This FREE broadcast is for:
All Paid Tax Return Preparers

Learn about new requirements for tax preparers including:

- Preparer Tax Identification Numbers (PTIN)
- Registration
- E-file mandate
- Competency testing and continuing education
- Preparer tax compliance verification checks

Earn Continuing Professional Education credit:

- Enrolled agents receive one CPE credit for participating for a minimum of 50 minutes from the start of the broadcast.
- Other tax professionals may receive credit if the broadcast meets their organization's or state's CPE requirements.
- To receive credit, you must attend the broadcast on June 9. Register for the broadcast using your e-mail address and use the same e-mail address to login to attend. This will confirm your attendance and generate your Certificate of Completion. Groups can not register with one e-mail address and then receive separate Certificates. If certificates are needed, each person must register separately.
- Only June 9, 2010 participants will receive credit. If you do not need a certificate to obtain CPE credit, you may choose to view the archived version of the broadcast.
- Look for your Certificate of Completion by e-mail approximately one week after the broadcast. If you have met all requirements, you will receive your certificate automatically.

How to register for the session:

<http://www.visualwebcaster.com/event.asp?id=68828>

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.



Jim Quinlan has been hospitalized since December and is just “tired” of being sick. Give him a holler at 858 485-5153 x 4061.

BOARD OF DIRECTORS MEETING



The next meeting of the Board of Directors is **Thursday June 17th, 4 P.M.** at the **Sheraton Mission Valley** 2nd floor.

All members are welcome to attend. If you would like to attend, please contact Greta Ward at (619) 644-1752 or e-mail: abacus1@juno.com.

ATTENDANCE

	2010	2009
May Dinner Meeting	92	81
Pre-Paid Dinners	49	
June Dinner Meeting		80
Pre-Paid Dinners		49
July Dinner Meeting		137
August Dinner Meeting		96
September Dinner Meeting		84
October Dinner Meeting		110
November Dinner Meeting		85
Running Start Thursday		119
Running Start Friday		92
IRS Tax Forum-Town & Country		1435

THOUGHT FOR THE DAY

Grandkids are the rewards you get for not beating your kids to a pulp when they deserved it. Anonymous



Meeting Location Change Again!

The CSTC-San Diego Chapter meetings will be held at the **Sheraton Mission Valley** San Diego Hotel for the remainder of 2010. This second change of location was caused by several concerns raised during our May meeting at the Mission Valley Resort.

The **Sheraton Mission Valley** 1433 Camino Del Rio South, San Diego, CA 92108 (619) 321-4606, is located east of the Mission Center Road exit of I-8. The parking area is much closer to the meeting rooms in which we will conduct our dinner meetings. Parking will be validated when needed.

If driving from the I-805 freeway, exit onto I-8 westbound. Take the Mission Center Road exit, staying in the left lane. At the end of the exit ramp, turn left. Stay in either of the left two lanes. Turn left again at Mission Center Road to pass over the freeway. Remain in the center lanes. Pass through the next light, continue to Camino Del Rio South (landmark: Denny’s Restaurant), turn left. The Sheraton Mission Valley will be on the right.

If driving from the I-5 freeway, exit onto I-8 eastbound. Take the Mission Center Road exit, staying in the right lane. Turn right, and then turn immediately left in front of Denny’s Restaurant onto Camino Del Rio South. The Sheraton Mission Valley San Diego Hotel will be on the right.

The parking lot is on the left of the hotel. The side hotel entrance from the parking lot will bring you to the hallway outside our meeting room for June 17, 2010. For future meetings, the front hotel entrance will be closer to our assigned rooms.

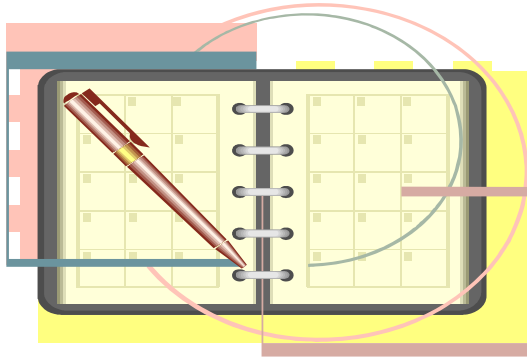
Submitted by Linda Farmer-Francis,
Arrangements Committee Chair

2011 RUNNING START LOCATION

The **Sheraton Mission Valley** will host the January 6 & 7, 2011 Running Start. Contact Marc Lord for more details @ Mlord@htk.com.

NEW DINNER MEETING LOCATION

Sheraton Mission Valley
1433 Camino Del Rio So
Mission Valley, San Diego, CA
(See article on page 3.)



2010 MEETING DATES

June 17

(Pre pay dinner deadline)

July 13 (w/EA's @ Sheraton Mission Valley)

HOT TOPICS

MIKE KARL & DAVE GORSICH

August 19

IRS CRIMINAL CASES

KELLY HOANG

September 16

LLC & OTHER BUSINESS ENTITIES

VICKI MULAK

October 21

San Diego Chapter's 35th Anniversary

CALIFORNIA UPDATE

LYNN FREER

November 18

(Installation of officers)

IRS HOT TOPICS

TONY ALLEVATO

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 your email address.

Newsletter Articles & Advertising

Submit your articles and ads to Terry Smith (619) 283-8055 or email to sdtaxpro@san.rr.com. This is a **new email address**. 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 July 2010 issue is June 25, 2010.

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.

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.

CHAPTER WEBSITE

A New Website Manger Is Needed. See page 2 of the newsletter.

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.

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 **different eligible** guest to dinner one time at no charge to the May through November dinner meetings.

Requirements:

- Guest must be eligible to **join CSTC**
- First time to chapter meeting

TAX EDUCATIONAL EVENTS

Registration Forms and additional information at the chapter's website - www.cstcsandiego.org.
Also check out other educational events in San Diego County

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 Hilton Garden Inn, 6450 Carlsbad Blvd. Carlsbad

San Diego Chapter: www.cstcsandiego.org

Dinner meeting 3rd Thursday 5:30 PM at Sheraton in Mission Valley.

Cancellation of Debt Sept 22 & 23 at National Univ more info at cstc-cod-workshop@nyms.net.

1040 Running Start Seminar is January 6 & 7, 2011 at the Sheraton in Mission Valley.

South Bay Chapter: www.cstcsociety.org/SOUTHBAY

Dinner meeting 4th Tuesday 6 PM at Mangia's Italiano, Chula Vista

Temecula Chapter: www.cstcsociety.org/TEMECULA

Dinner meeting 1st Wednesday 5:30 PM at Riches Real American Diner, Hot Springs Rd, Murrieta

CSTC Society: www.cstcsociety.org

Summer Symposium, June 6 – 8, 2010, Reno, NV. A brochure is available at the society's website.

IRS National Forum – August 31, Sept 1 & 2, 2010. 18 hours of C.E. at Town & Country Hotel, Mission Valley

More information is available at www.irstaxforum.com and click the "Seminars" link.

San Diego Chapter of Enrolled Agents – www.cseasandiego.org

NEW — 2010 CHAPTER MEMBER BENEFITS — NEW

The following motion was passed on April 22, 2010.

1. Free Quickfinder if you attend 4 dinner meetings from May thru October 2010 **AND** payment is received by 31 October 2010 for the 2011 San Diego Running Start.
2. The Monthly Chapter Dinner Meeting cost is \$27.00 for Members with reservations and \$32.00 for Members without reservations and Guests. Pre-Paid Dinner Meetings cost shall be **\$150.00 paid No Later Than 20 May 2010. Pre-paid cost thru 17 June will be \$160.00.**
3. Two Name Badge Drawings will be held during each monthly meeting May – October 2010 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), Foreclosure Sessions, or Running Start (not Early Bird Special Discount). Coupons will be valid May 2010 through December 31, 2011 only. No exceptions. (Coupons have no cash value and are not convertible to cash or refunds for previously paid event fees.

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.

IRS SEEKS APPLICATIONS FOR ADVISORY COUNCIL IR-2010-56

WASHINGTON — The Internal Revenue Service today announced it is accepting applications for new members for the Internal Revenue Service Advisory Council (IRSAC), which provides a forum for IRS officials to discuss key areas of tax administration with a broad range of tax and other relevant professionals.

“Members of IRSAC provide the IRS with important feedback from a wide range of professionals dealing with many different aspects of our tax system,” said Doug Shulman, IRS Commissioner. “IRSAC members are doing their part to support sound tax administration.”

IRSAC has about 20 open seats for three-year terms starting in January 2011. IRSAC can have up to 35 members and submits a report to the IRS Commissioner annually at a public meeting in the fall. Applications will be accepted from May 3 to June 18, 2010.

Nominations of qualified individuals may come from individuals or organizations. Federally registered lobbyists cannot be members of the IRSAC. IRSAC members are drawn from diverse backgrounds. Membership is balanced to represent the tax professional community, including tax attorneys, certified public accountants, enrolled agents, enrolled actuaries, appraisers, and the business community, among others.

Nominations should describe and document the proposed member’s qualification for IRSAC membership, including the applicant’s knowledge of Circular 230 regulations and the applicant’s past or current affiliations, as well as dealings with the particular tax segment or segments of the community that the applicant wishes to represent on the council.

More information, including application requirements, is available on the Tax Professional’s Page on IRS.gov. Questions about the application process can be sent to the following e-mail address: *public_liaison@irs.gov.

CSTC STATEWIDE MEMBERSHIP

Central Valley	49	Sacramento	38
East County, San Diego	108	San Diego	200
Foothill	30	San Francisco Bay	58
Greater Long Beach	97	San Jose	40
Hi Desert	24	South Bay, San Diego	48
Inland Empire	74	Temecula Valley	34
Los Angeles	38	At large	25
North Country, San Diego	98	Totals	1078
Orange county	117	San Diego County has 454 members or 42%.	

SAN DIEGO CHAPTER COMMITTEES

Our Chapter is the largest in California (currently 200) 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 or Greta Ward to fill in a vacancy:

Anniversary Party	Mari Jo Hughes	Membership	Nadine Allevato
Arrangements	Linda Farmer-Francis	Mini Workshops	
Audit	Rick Wagner	Newsletter	Terry Smith
Dinner Speakers	Steve Comer	Nominations	
Elections		Operation Manuel	Shirley Henry-Bisantz
Fiance/Budget	Duane Lewis	Quickfinder Tax Book	Tom Groel
Government Affairs	Val Daigle	Running Start	Randy Dahlin Marc Lord
Hall of Fame	Shirely Henry-Bisantz	Sunshine	Nadine Vallevato
Member of the Year	Terry Smith	Website	Larry McClellan

SAN DIEGO CHAPTER

OFFICERS

President

Greta Ward

(619) 644-1752

E-mail: abacus1@juno.com

1st V. P.

Steve Comer *Education/Speakers*

(619) 698-0202

E-mail: Scomer@tax-wealth.com

2nd V.P.

Terry Smith *Member of the Year*

(619) 283-8055

E-mail: sdtaxpro@san.rr.com

Secretary

Mari Jo Hughes *Anniversary Party*

(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 *Reservations*

(619) 698-0508

E-mail: racarter@sbcglobal.net

BOARD OF DIRECTORS

Nadine Allevato *Memberships*

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

E-mail: nadine8@san.rr.com

Val Daigle *Government Affairs*

(619) 435-3131

E-mail: val@westax.com

Linda Farmer-Francis *Arrangements*

(619) 264-6070

E-mail: laftaxes@pacbell.net

Shirley Henry-Bisantz *Hall of Fame*

(602) 224-9038

E-mail: shirley@kachinaranch.com

Marc Lord *Running Start*

(858) 202-7239

Mlord@htk.com

Newsletter Editor

Terry Smith

(619) 283-8055

E-mail: sdtaxpro@san.rr.com

Web Site

Larry McClellan

(858) 278-1164

E-mail: cstcsd@san.rr.com



JUNE ANNIVERSARIES

LINDA	ASHLOCK	26 YEARS
TERRY	DAVIS	11 YEARS
RIK	HENSLEE	22 YEARS
MIKE	KARL	13 YEARS
MARIANNE	LINDSAY	15 YEARS
JANETTE	MAHNKEN	2 YEARS
STEPHANIE	MATTICKS	13 YEARS
DEBORAH	POTTER	20 YEARS
MORLEE	SCOTZIN	20 YEARS
PATRICIA	UHART	8 YEARS
ELAINE	WOODSON	23 YEARS

A TOTAL OF 173 YEARS

BREAKFAST MEETINGS

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

San Diego Chapter — 2nd and last Friday each month, at 7:30 a.m. at Coco's Restaurant, 5955 Balboa Ave, in the Clairemont area. Contact Val Daigle, (619) 435-3131, e-mail val@westax.com.

South Bay Chapter — Tuesdays at 8 a.m., at Jimmy's by the Park Restaurant in Chula Vista. Contact Donita Chacon at (619) 470-9293.

Business Entities Tax Group — 1st Thursday at 7:30 a.m. at Coco's Restaurant, 5550 Lake Murray Blvd, La Mesa. Contact Janice Brown at (619) 464-1041.

Fiduciary Tax Group — 2nd & 4th Thursdays 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 advice both the San Diego Chapter and the Society office of your new address, phone and e-mail address.

- SAN DIEGO CHAPTER:
7484 University Ave Suite 340
La Mesa Ca 91941-6030
Tel (619) 644-1752 • Fax (619) 644-5686
Web Site: www.cstcsandiego.org.
- 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