

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

PROFESSIONAL ORGANIZING TIPS



- Keep organizing systems simple.
- Ignore the telephone. If it rings when you are working, let the voice mail take the call.
- Discard anything that's broken, outdated, or tough to operate.
- If it's hard for you to throw things away, put them in a box, write the date on the box and store it. If you haven't opened the box in six months, throw it away.
- Remember that 80% of what we file is never looked at again.
- Take 15 minutes each day to get organized for the next day.



The above is on the Chapter's website on the Tax Office Management page for you to print and post next to your desk.

2007 MEMBER OF THE YEAR

DUANE LEWIS

More than 25 years ago he moved to California, got his EA and bought Fletcher Hills tax service from Bill Longfield. Duane has also been a rightfielder on his brother Don's baseball team. In 1988 he joined CSTC and currently serves as our Treasurer. Duane's second career is hanging wallpaper, and he's good at it too.

HALL OF FAME

RANDY DAHLIN

Randy has served on the Board of Directors and as an Officer. Currently he co-chairs the Running Start and has been instrumental in helping all the Chapter's educational events run efficiently and very smoothly. In his down time he's a Broadcast engineer for radio stations.

OFFICERS FOR 2008

President	Rose Carter
Past President	Tony Applebaum
1 st Vice President	Terrence Smith
2 nd Vice President	Stephanie Matticks
Secretary	Linda Farmer
Treasurer	Duane Lewis
Director	Nadine Allevato
Director	Stephen Comer
Director	Val Daigle
Director	Shirley Henry-Bisantz
Director	Mari Jo Hughes
Director	Greta Ward

PRESIDENT'S MESSAGE

Dear Fellow Members,

As another year has come and gone I hope to find that you all had a safe holiday. Our Holiday Party was terrific as the committee put on an excellent event. Our entertainment was provided by our very own Kevin McCully and his band "The Players". For those of you that did not attend, we had a great time and the dancing continued until the very end, it was wonderful. Once again, our hats off to the holiday party committee.

Our CSTC San Diego Chapter Office will be moving this month. We have no need for a chapter office as you get all the latest and greatest information from our Newsletter. As of now, the president will take on the communication responsibilities for the Chapter. I want to thank Larry McClellan and Heather Santineau for all the years servicing the chapter office.

Our Charity Program this year was the Senior Community Centers. This program provides many services to seniors as well as delivering food throughout the San Diego area. As always our CSTC membership was very generous.

Lastly, **I want to applaud the Officers and Board of Directors** for their outstanding efforts they have given to our chapter and the volunteers that have given their time on all other projects that could not have been possible had they not volunteered in order to make this chapter run smoothly. We have a great chapter to be proud of and the professionalism that we portray is noticed by many.

As new members join, I hope you take advantage of all the benefits that are available to you. The networking of our membership is very valuable. You will find that the education programs and the people you meet in our organization are very valuable and something you just can't get out of a book. Get involved and make yourself known and you will feel the same as I do, you can't belong to a more rewarding organization.

To everyone and their families, have a safe, healthy and prosperous year.

Regards,
Rose Carter
Chapter President

2008 MEETING DATES

Mark Your Calendar

May 15, 2008

June 19, 2008

July 8, 2008 - (EA hosted joint meeting)

August 14, 2008

September 18, 2008

October 16, 2008

November 13, 2008

December 18, 2008

BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is **Thursday January 24, 2008, 11:00 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.

CSTC LOGO

A member may use the CSTC logo under the following conditions only:

1. The designation "member of" immediately precedes or follows or is immediately above or below the name or logo California Society of Tax Consultants.
2. The above reference use is permitted on business cards, business letterhead, and biographies of the members. A member may also use the name and logo on educational materials presented by a member.
3. The use of the name or logo in any other advertising, materials or media such as the yellow pages is only permitted with the permission of the CSTC office.
4. The CSTC name may appear on a common list of organizations of a member as long as that list is titled "member of" and no other designation or representations are made in reference to said list.

ATTENDANCE

Attendance at our meetings and classes has been as follows:

	2006	2007
May dinner meeting	88	102
June dinner meeting	85	84
July dinner meeting	105	92
August dinner meeting	97	96
September dinner meeting	105	97
September Mini Symposium	106	96
October dinner meeting	106	126
November dinner meeting	85	91
December Christmas Party	64	96

	2007	2008
Running Start Thursday	122	104
Running Start Friday	114	101

Current San Diego Chapter membership is 205 with 14 joining during 2007.

MEMBER BENEFITS

As a benefit for your continued attendance at all of the Chapter activities you are enjoying the following:

	2006	2007
Quickfinders	38	81
RIA tax book		56
Free Running Start	2	3
50% off Running Start fee		96
Recruiting new members		14

EDUCATIONAL INCENTIVES

The Board will be meeting to review the entire incentive program for the 2008 meetings. Check the website for details or the May issue for complete details.

SOCIETY MEMBERSHIP DRIVE

“2012 BY 2012”. Members who bring in a new member will receive \$25 CSTC education voucher from Society.

TAX NEWS

Filing Returns Delayed Until February 11th

As many as 13.5 million taxpayers using five forms related to the Alternative Minimum Tax (AMT) legislation will have to wait to file tax returns until IRS completes the reprogramming of its systems for the new law. IRS has targeted Feb. 11, as the potential starting date.

For the affected forms and other details, see news release IR-2007-209. Check www.irs.gov periodically for AMT processing updates.

EITC Due Diligence Penalties

In a speech to the AICPA on 11/7/07 Kathy Petronchak of the IRS noted that the EITC Due Diligence Visit Program for FY 2007 is complete and a total of 500 visits were completed, resulting in 217 preparers being penalized with 8,483 penalties proposed. See education page for FREE class on EITC Due Diligence.

Five GM 2008's Ok'd For Credit

IRS has certified the following General Motors vehicles as qualifying for the Hybrid Motor Vehicle Credit.

- Chevrolet Tahoe (2wd & 4wd) \$2,200
- GMC Yukon (2wd & 4wd) \$2,000
- Saturn Vue Green Line \$1,500

NEW - FTB “My Account”

On January 2, 2008, FTB changed the name of their online individual tax account service called “View Payments and Balance Due” to “My FTB Account”.

Previously, taxpayers and their authorized representatives could view:

- Estimated tax payments, estimate transfers, and extension payments waiting to be applied to a tax return.
- The most recent payments applied to a balance due
- The total balance due as of the date they accessed this service
- A summary by tax year of the balance due

New - Now also available for viewing:

- California wage and withholding information
- FTB-issued 1099-G and 1099-INT information

FTB Owes Nearly \$10 Million

The Franchise Tax Board is trying to find more than 37,000 California taxpayers who are owed \$9.8 million in state tax refunds. (continued next page)

This year FTB issued nearly 10 million refunds worth more than \$8.4 billion. At issue are uncashed

individual refunds ranging from a few dollars to more than \$68,000. In many of the cases the refund checks are returned to the FTB as undeliverable by the US Post Office because taxpayers have moved between the times they filed their taxes and the refunds were mailed. Taxpayers can check the status of their refund at the FTB website www.ftb.ca.gov.

SAN DIEGO CHAPTER NEWSLETTER

Newsletter via Email

The chapter's e-mail service will provide you with notice when the newsletter is posted to our web site, important updated tax information and chapter news.

E-mail your address to larry@taxnewsandtips.com. If you change you email address please notify Larry. Include "CSTC" in the subject of your e-mail.

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.

Next Newsletter – May 2008

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

The deadline for articles and ads is the 25th of the preceding month.

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

Advertising During Tax Season

Submit ads to cstcsd@san.rr.com for posting to the Chapter's website during the filing season. Include the subject "CSTC – AD" in your e-mail.

SOCIETY is looking for members interested in grading and assisting students in tax courses provided through CSTC. Hourly fee paid. Contact Bev at society office. There is also a need for volunteers to review course material. Contact Shari Hardy.

OFFICE SPACE KEARNY MESA: Available 12/15 lease required. Elaine Woodson (858) 277-8780, Tue-Thru 9-5.

FULL CHARGE BOOKKEEPER NEEDED: Small office seeking full time bookkeeper to handle multiple clients. Experience in AME and QuickBooks would be helpful, but not a must. Flexible hour's available if needed. Ed (858) 560-4146 x 4.

1041 FIDUCIARY CLIENTS: Very experienced preparer looking for more 1041 clients. Intimidated by these returns or just not comfortable preparing them? I am interested in purchasing just the 1041 work. Val Daigle (619) 435-3131 or val@westax.com.

NEED A "RETROSPECTIVE APPRAISAL"? Value for date of death, estate planning, divorce settlement, refinance or purchase? Licensed by CA and a Certified Residential Real Estate Appraiser. Call Skip DeGreef (619) 977-7547. CSTC member.

WANTED: MORE CLIENTS. Looking to expand Mission Valley practice, call Terry (619) 283-8055.

FOR SALE-OFFICE FURNITURE. Beautiful natural wood, high-end three-sided desk with glass top, two drawer natural wood credenza filing cabinet and chairs. All high quality for that look of success. Joe Foti (619) 463-3611 x 305.

SAN DIEGO CHAPTER MAILING SURVEY

The results to last month's survey question - "How do you plan to get tax returns to your clients due to new postal rules?" have been posted to our website www.cstcsandiego.org.

TAX EDUCATIONAL EVENTS

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

2008 Quickfinder Seminar

January 9 - Presented by CSTC South Bay Chapter

Rescheduled Tax Class

“Applying Integrated Tax, Estate And Financial Planning”

January 18TH, 2008, 8:30-3:30 at National University, 9388 Lightwave Ave, San Diego
Presented by CSEA San Diego Chapter. Contact Elaine Smith at (619) 562-7671.

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 Handlery Hotel, Mission Valley.

South Bay Chapter: www.cstcsociety.org/SOUTHBAY

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

1/9/08 - 2008 Quickfinder Seminar

Temecula Chapter: www.cstcsociety.org/TEMECULA

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

CSTC Society: www.cstcsociety.org

22nd Summer Tax Symposium June 1-4, 2008 Reno NV. Complete information at www.cstcsociety.org/whatnew.

IRS STAKEHOLDER - National Phone Forum January 16th. FREE. Details at nationalphoneforum@irs.gov.

IRS NATIONAL FORUM - September 9-11, 2008. 18 hours of C.E. at Town & Country Hotel, Mission Valley.

LACERTE TAX USERS' GROUP (LTUG)

This Lacerte Users' Group is a valuable resource for any Lacerte user. The primary focus is the Lacerte Tax Preparation program and getting technical advice and 'how to' information. In addition, a member can also obtain tax law/tax issue help.

Members of LTUG range from those who have used Lacerte since inception and those that are brand new users. It is not a place to carry on non-Lacerte or non-tax conversations.

1. **Sign-Up As A Member** - You must sign up as a Member before making any postings. Membership is free. To sign up go to <http://groups.yahoo.com> and click on the "Join This Group" link in the upper right corner.
2. **Activate Your Account** - After you sign-up you will receive an email requiring that you select the link at the bottom of the email that states "Important! Click here to activate your new account."
3. **Join the Group** - Once your account is activated go to <http://groups.yahoo.com>. In the 'Find a Yahoo! Group' enter "LTUG". You will then need to "Join the Group" by checking you sign-up information.

After doing the above you can get into the Yahoo Lacerte Tax User Group. This will bring up the LTUG page where a member can read postings, reply to postings, or enter postings. They can also look at the archives for prior postings and uploaded files.

Members can also setup LTUG as an e-mail client, ltug@yahoogroups.com, and setup a LTUG folder in their e-mail program. Be aware that there will be a large volume of e-mails received in their inbox.

Another key point is that at least one Lacerte representative reads and posts on this site - Bill Whitson of the Lacerte Training Division. Bill provides a lot of help with "How To" and even insight to what is going on at Lacerte.

This is a great resource for any Lacerte user and I highly recommend it.

Prepared by Val J. Daigle

WEB TAX RESOURCES

Tax Professionals have access to helpful information on the Web. Use the Web to help yourself all year. Bookmark helpful sites in your web browser software and make sure you are current with your Free Subscriptions with IRS, FTB, other states and government agencies.

IRS

The IRS Website is located at www.irs.gov. Be sure to bookmark the “**Tax Professionals**” and “**Basic Tools for Tax Pro**” web pages. The Basic Tools page has an extensive list of links to often-used IRS web pages and contact information.

The “**Site Map**” link at the top of the IRS Website is a great index to links on the IRS Website.

IRS Subscription Services. Sign-up for the free services at the IRS Website. Select the “Tax Professionals” tab at the top of the Website. Then select the link to “**Subscription Services**” on the left of the page. Then select the subscription service(s) you want. There are many IRS e-mail subscription services. **E-News for Tax Professionals** is one of the best ways for the tax professional community to get the latest national and local IRS news.

FTB

The FTB Website has been recently redesigned. Check out a FTB’s home page at www.ftb.ca.gov. Make sure your bookmarks are still good.

NEW - Beginning January 2, 2008, FTB no longer requires a Customer Service Number (CSN) to access the Web Pay, Electronic Installment Agreements, and CalFile online services. Simply enter taxpayer’s social security number and last name to access these services.

FTB Subscription Services is a free automated service providing important information by email. You can choose from a variety of topics and change or discontinue the topics you subscribe to at any time. For more information or to check out the services you previously subscribed to select the “Tax Professional” Tab on the top of the home page and then select the “Subscription Services” link on the left of the Tax Professional page.

Account Balance and Return Status - The taxpayer’s Account Balance (including all payments received and credited by FTB to the account), Refund Status, and e-file return status are available by selecting the “Individuals” tab on the top of the home page, then select your choice under the “View Your Account” section.

The **FTB Tax Professional Web Page** contains information and links for tax pros including contact phone numbers. Be sure to subscribe to *FTB Tax News* to get the monthly FTB newsletter.

STATE WEBSITES

State Websites can be accessed at the following:

- On the IRS Website select the “Government Entities” tab on the top of the web page. Then select “State Links” on the left of the page.
- Use TaxSites Website at www.taxsites.com. On the left of the home page are links to “State Tax Forms” and to “State Tax Departments”.

Note: The “State Tax Form” link did not include all of the states in late December 2007. The “State Tax Departments” link will get you to the list of all state tax websites from which you can get tax forms.

CSTC WEB SOURCES

The San Diego Chapter’s website at www.cstcsandiego.org has links to many useful web resources on the “Internet Resources” page.

OTHER WEB RESOURCES

Share with CSTC members other web resources you have found to be helpful in your tax practice with CSTC members. Please e-mail the web addresses with a brief discription to cstcsd@san.rr.com for posting on the chapter’s website.

Prepared by Larry McClellan

SAN DIEGO CHAPTER

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BREAKFAST MEETINGS

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

San Diego Chapter — Fridays, starting Feb. 6th, 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 8:00 a.m., at Love's Restaurant, I-805 at E Street in Chula Vista. Contact Donita Chacon at (619) 470-9293.

East County Chapter — As of 1/1/07 no meetings.

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.

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 cstc@san.rr.com.

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: NEW LOCATION**
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