



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

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## California Society of Tax Consultants San Diego Chapter Newsletter • February 2007

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### **NEW — 2007 CHAPTER MEMBER BENEFITS — NEW**

#### **FREE EDUCATIONAL PROGRAMS**

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.

#### **DISCOUNTED 1040 RUNNING START SEMINAR PRICE**

Attend at least four (4) Chapter Dinner Meetings between May and September and receive a 50% discount off the San Diego Chapter 1040 Running Start Seminar registration.

#### **DINNER MEETING PRICE REDUCED**

- The Monthly Chapter Dinner Meeting cost is reduced to \$20.00 for Members with reservation and \$28.00 for Members without reservations and Guests. Pre-Paid Dinner Meetings cost shall be \$110.00. (Chapter cost is approximately \$24.00 per person.)
- Members who pre-pay for their dinner meetings no later than the May 2007 Dinner meeting (no exceptions) shall be awarded a free RIA Federal Tax Handbook (Fall 2007).

#### **EDUCATIONAL REBATE**

Attend at least four (4) Chapter Dinner Meetings AND San Diego Chapter Running Start (Jan 2008) OR two (2) sessions of the Chapter Mini Symposium Special Interest Classes AND a Society Seminar or Classroom education event and receive a rebate of \$100.00

#### **FREE QUICKFINDER or TAXBOOK 1040**

Attend at least four (4) Chapter Dinner Meetings and the San Diego Chapter Running Start and receive a Free Quickfinder 1040 or TaxBook 1040.

#### **EDUCATIONAL CERTIFICATES**

At each Chapter Dinner Meeting May – October (excluding the July meeting when hosted by CSEA) provide a drawing for four (4) \$25.00 Educational Certificates that may be used for any San Diego Chapter Dinner Meeting or San Diego Chapter Educational Event registration. (Certificates must be used by January 31 of the year following the year of the drawing. These certificates may be combined with any other discount or education certificate.)

#### **VOLUNTEERS RECEIVE DISCOUNT**

For any Chapter member (excluding current Officers and Directors) who volunteers and serves on a Chapter committee, shall receive a 25% discount off the San Diego Chapter Running Start registration. This discount may be combined with any other educational discount or certificate.

#### **FREE RIA BOOK**

For any Chapter member (including Officers and Directors) who attends all Chapter Dinner Meetings May – November, they shall receive either the Federal or the State RIA tax book free (member's choice).

#### **RECRUIT A NEW MEMBER AND RECEIVE \$25**

For each new member that a current San Diego Chapter member recruits and signs up as a member of the San Diego Chapter, the Chapter shall pay \$25.00 of the current (recruiting) members Society annual dues in the following year. Any current member who recruits and signs up four (4) new San Diego Chapter members, the Chapter shall pay the full amount of the Society annual dues in the following year.

The Board of Directors unanimously passed the above San Diego Chapter Member benefits on Jan. 17 2007 to (1) provide low cost quality education for our members, (2) encourage more members participation in chapter events and (3) thank our members for their continued loyal support of our chapter.

## FILING SEASON'S TOP 10 "TO DO" LIST

1. **Backup All Computers NOW.**  
Hard drives fail. The only question is when.
2. **Set-Up A Procedure For Daily Backup**  
Make two copies and take the second copy out of the office – rotate copies daily. In event a copy is stolen or destroyed “Do You Have Time To Reinput Lost Data”.
3. **Sign-Up For “Tax Professional E-News Services”. IRS** at [www.irs.gov](http://www.irs.gov). Select the “Tax Professional” link, then select the “Subscription Services” link. Also sign-up for other IRS e-mail news services. **FTB** at [www.ftb.ca.gov](http://www.ftb.ca.gov), use the Subscription Services link under Tax Professionals.
4. **Update Software** you use during filing season.
5. **Stock Up On Office Supplies Now** and take inventory weekly during filing season. Who has time go out to get supplies during filing season.
6. **Check That Your Browser Favorite Website List Is Current.** This will save time during filing season looking for Internet resources.
7. **Check The Chapter’s Website** for breaking tax news at the *Tax News* and *Internet Resources* pages.
8. **Set A Quit Time & Stick To It.**  
Stop working a half hour earlier each day than you did last filing season.  
Finish the season on Friday, April 13<sup>th</sup>, not on Monday, April 16<sup>th</sup>.  
More mistakes are made when you are tired.
9. **Trust Your Gut. Say NO** when you “feel” the client is asking for the unreasonable. Ask yourself - “Do You Want Put Your Business In Jeopardy To Save Taxes For The Client.”
10. **Make Time For Yourself.**  
Take time during daily to clear your head and relax. Remember - “You Can Always File Extensions”.

*The “Top Ten To Do List” was originally published in the January 2007 newsletter.  
Due to requests it is being repeated in this issue.*

## 2-DAY MINI SYMPOSIUM

The San Diego Chapter’s 2007 Mini Symposium is slated for 5 & 6 September 2007 (Wednesday and Thursday) at Pechenga Indian Casino (located slightly north of Temecula).

Greta Ward, Chairperson, requests your input as to Class Topics to be presented, and just as important what topics you DO NOT wish to have offered. Please email Greta with your input at [abacus1@juno.com](mailto:abacus1@juno.com).

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### 2007 MEETING DATES

*Mark Your Calendar*

May 17, 2007

June 21, 2007

July 19, 2007

August 16, 2007

September 20, 2007

October 18, 2007

November 15, 2007

**Holiday Party**

December 13, 2007

**Thursday**

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### NEW MEMBER FEE

As of Jan. 1, 2007 the CSTC Society dues were increased \$10. Renewal dues will be \$130. New members have an additional one-time fee of \$25.00 for a total of \$155.00.

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### NEXT BOARD MEETING

Will be held on Thursday, April 19, 2007 at 9:30 AM at the Handlery Hotel in Mission Valley.

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### ADVERTISING DURING TAX SEASON

Classified ads will be posted to the Chapter’s website during the filing season. Submit ads to Larry McClellan, [larry@taxnewsandtips.com](mailto:larry@taxnewsandtips.com) for. Include in email the Subject “CSTC – AD” or it won’t be opened.

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### HOLIDAY PARTY PHOTOS

Take a look at the photos taken by Dan Matticks at the chapter’s December Holiday Party. The photos have been posted to the chapter’s website [www.cstcsandiego.org](http://www.cstcsandiego.org). Be patient, the photos will take time to appear on your monitor.

## **TAX DEADLINES EXTENDED TO APRIL 17, 2007 Not A Joke !!!!**

The Internal Revenue Service announced January 24<sup>th</sup> that taxpayers across the nation will have until Tuesday, April 17, 2007, to file their 2006 returns and pay any taxes due.

Taxpayers will have extra time to file and pay, because April 15 falls on a Sunday in 2007, and the following day, Monday, April 16, is Emancipation Day, a legal holiday in the District of Columbia.

The April 17, 2007 deadline will apply to any of the following:

- 2006 federal individual income tax returns, whether filed electronically or on paper.
- Requests for an automatic six-month tax-filing extension, whether submitted electronically or on a paper Form 4868.
- Tax year 2006 balance due payments, whether made electronically (direct debit or credit card) or by check.
- Tax-year 2006 contributions to a Roth or traditional IRA.
- Individual estimated tax payments for the first quarter of 2007, whether made electronically or by check.
- Individual refund claims for tax year 2003, where the regular three-year statute of limitations is expiring.

Other tax-filing and payment requirements affected by this change are described in IRS Publication 509, Tax Calendars for 2007, available at the IRS web site at <http://www.irs.gov/publications/p509/index.html>.

Additional information is available in the IRS News Release # IR-2007-15.

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### **CHANGE OF ADDRESS**

If you move, please advise both the San Diego Chapter and the CSTC 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](http://www.cstcsandiego.org).

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E-mail: [cstcsociety@sbcglobal.net](mailto:cstcsociety@sbcglobal.net)

### **E-Mail Address Changed ?**

E-mail your new e-mail address to [larry@taxnewsandtips.com](mailto:larry@taxnewsandtips.com).  
Include in your e-mail the Subject "CSTC – New E-mail Address"  
or it won't be opened.

## SAN DIEGO CHAPTER

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### BREAKFAST MEETINGS

Join CSTC members for breakfast to discuss tax issues.

Members buy their own breakfast.

Members of CSTC are invited  
to attend meetings of all chapters.

**San Diego Chapter** — Fridays, starting Feb. 1<sup>st</sup>, at 7:30 a.m. at Coco's Restaurant, 5955 Balboa Ave, in the Clairemont area. Questions contact Val Daigle, via e-mail at val@westax.com or call Val at 619-435-3131.

**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.

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

**NEW North County Chapter** — Breakfast, Luncheon, and Accounting & Tax Meeting information has been posted at [www.cstcsandiego.org/breakfast.htm](http://www.cstcsandiego.org/breakfast.htm).

**Fiduciary Tax Group** — 2<sup>nd</sup> & 4<sup>th</sup> 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.

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### CHAPTER'S WEBSITE

Visit the San Diego Chapter's website at [www.cstcsandiego.org](http://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 ideas to [larry@taxnewsandtips.com](mailto:larry@taxnewsandtips.com). Include in email the Subject "CSTC – Website" or it won't be opened.