



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

California Society of Tax Consultants San Diego Chapter Newsletter • May 2007

Dinner Meeting

Date Thursday, May 17, 2007

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 Setup
7:00 p.m. Dinner
7:30 p.m. Speaker continues

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

Menu

- Caesar Salad
- Twin Medallions of Beef on Garlic Toast with Porcini Cream Sauce
- Duchess Potatoes
- Desert, Chef's choice
- Choice of Coffee, Tea, Iced Tea
- **Vegetarian Meal Is Available**

Requests must be made with reservation

RESERVATIONS

Deadline is Noon, Wednesday, May 16th, 2007

On line at www.cstcsandiego.org/is-res.htm,

or call 1-800-994-4782, 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.

EDUCATIONAL PRESENTATION

Before & After Dinner

Topic

**“The TAX GAP Problem”
The Difference Between What Taxpayers Report
vs.
What IRS Thinks Compliance Should Be**

Speaker

Tony Allevato, IRS

CTEC 1000-CE-2076

(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

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.

PRESIDENT'S MESSAGE

Dear Friends & Colleagues,

Another tax season has come and gone, hopefully you made it through again without any hitches. Hopefully this was your best season ever and that you have had some down time to recuperate. I know that most have taken off or on some type of R&R. As for me, I will be on the beaches of Hawaii enjoying a few mai tai's as you read this.

I'm sure that others outside the tax world can't appreciate the time we have condensed into our lives in eleven weeks of non-stop work. Surely our clients don't have a clue; they just want their tax return DONE. I commend all of you for the work, dedication and professionalism you put out and still are sane at the end of tax season.

The month of May is approaching us very quickly and our May 17th dinner meeting will soon be here. We have invited Anthony Allevato to speak on tax issues. We have had him in the past and are welcoming him back.

The CSTC Summer Symposium is coming up June 3rd - 6th in Las Vegas. As always there are outstanding speakers and topics that we all can use. For info on this program you can go to the society's website at cstcsociety.org and sign up if you haven't already.

This year San Diego Chapter is putting on a Mini Symposium to be held at the Pechanga Casino Resort on September 4th, 5th & 6th. Rooms will be available. We will have some great speakers and topics at this program. Our June issue will have all the particulars. Greta Ward will be chairing this event. She has received a lot of interest from members and surrounding chapters.

Looking forward to seeing all of you at our May 17th dinner meeting.

Rose Carter
Chapter President

OUR CHAPTER NEEDS VOLUNTEERS

WE NEED VOLUNTEERS - DON'T BE SHY

Members are needed to get involved in committees and learn from the "veterans". The chapter cannot continue to grow and provide the benefits to the members without more members getting involved. Without volunteers, we will not continue to be a successful chapter.

Members who have been on committees but have had some time off are also encouraged to volunteer again.

Please contact a chapter officer or a member of the Board of Directors to offer your help.

BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is **Thursday May 17th, 2007, 3:30 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.

2007 MEETING DATES

June 21

July 19 (Joint EA meeting)

August 16

September 20

October 18

November 15

December 13 (Thursday)

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

Requirements:

- Guest must be a tax preparer
- First time to chapter meeting

Also tell them about the 1040 Running Start Seminar.

CSTC – 2007 SUMMER TAX SYMPOSIUM

Las Vegas, Nevada, June 3 – 6, 2007

For listing of topics and speakers and more information go to the CSTC Society's web site at www.cstcsociety.org/whatnew.htm and select the link to "Summer Tax Symposium – 2007".

FTB SURVEY OF TAX PROFESSIONALS

Let FTB know what you think of their on-line services and offer suggestions for new on-line services.

Go to the FTB home page at www.ftb.ca.gov and select "Survey for tax professionals" at the bottom of the "Tax Professionals" column.

Let FTB know what you think of the two-step procedure:

1. To obtain a FTB Customer Service Number (CSN) and
2. Requiring entry of the CSN and to reenter the taxpayer's Social Security Number to access the FTB information.

Let FTB know if you would like to see the second step eliminated so you would automatically access the page for available on-line information.

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 June 2007 issue is May 25, 2007.

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.

CLASSIFIEDS

FOR SALE Oak furniture, Toshiba E-200 20 CPM copier, 5 Drawer 42" lateral file (3), office refrigerator & microwave. Office closing May 31st. Rik Henslee 858-679-7649, email Rik@sbcglobal.net

FOR SALE Conference table (8' x 3.5'), excellent condition, \$100. Larry 858-278-1164.

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

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.

POSTAL RATES INCREASE

Effective May 14, 2007

FIRST-CLASS MAIL SINGLE PIECE

Weight Not Over (Ounces)	Letters	Large Envelopes	Packages
1	\$0.41	\$0.80	\$1.13
2	0.58	0.97	1.30
3	0.75	1.14	1.47
3.5	0.92	1.31	1.64
4	–	1.31	1.64
5	–	1.48	1.81
6	–	1.65	1.98
7	–	1.82	2.15
8	–	1.99	2.32
9	–	2.16	2.49
10	–	2.33	2.66
11	–	2.50	2.83
12	–	2.67	3.00
13	–	2.84	3.17

Additional Ounces.. \$0.17

Postcard..... 0.26

Letters that weigh one ounce or less and meet any nonmachinable characteristics in DMM 101.1.2 are subject to the \$0.17 nonmachinable surcharge.

NOTE: Letters over 3.5 Ounces use "Large Envelope" Rate Column.

(Continued on next page)

PRIORITY MAIL Service

Weight Not Over (Pounds)	Local Zones 1 & 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1	\$4.60	\$4.60	\$4.60	\$4.60	\$4.60	\$4.60	\$4.60
2	4.60	4.90	5.30	6.20	6.55	7.00	7.50
3	5.05	5.70	6.40	8.25	9.10	9.65	10.55
4	5.70	6.65	7.70	10.20	11.10	12.20	13.45
5	6.30	7.55	8.90	11.90	12.90	14.35	15.85

More information is available on-line at <http://www.usps.com/ratecase/>

NEW — 2007 CHAPTER MEMBER BENEFITS — NEW

The following motions were passed unanimously on 17 January 2007.

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.
3. Reduce the Monthly Chapter Dinner Meeting cost to \$20.00 for Members with reservations and \$28.00 for Members without reservations and Guests. Pre-Paid Dinner Meetings cost shall be \$110.00.
4. 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).
5. 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
6. Attend at least four (4) Chapter Dinner Meetings and the San Diego Chapter Running Start and receive a Free Quickfinder 1040 or TaxBook 1040.
7. 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.)
8. For any Chapter member (excluding current Officers and Directors) who volunteers and serves on a Chapter committee, they 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.
9. 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).
10. For each new member that a current San Diego Chapter member 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.

SAN DIEGO CHAPTER

OFFICERS

President

Rose Carter

(619) 698-0508

E-mail: racarter@sbcglobal.net

1ST V.P. – *Education & Speakers*

Steve Comer

(619) 698-0202

E-mail: scomer@tfs-lm.com

2ND V. P. – *Dinner Meetings and Arrangements*

Stephanie Matticks

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E-mail: stephanie007@sbcglobal.net

Secretary –

Linda Farmer

(619) 264-6070

E-mail: laftaxes@man.com

Treasurer – *Finance/Budget*

Duane Lewis

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BOARD OF DIRECTORS

Nadine Allevato — *Membership*

(858) 271-1199 or (858) 549-9500

E-mail: nadine8@san.rr.com

Tony Applebaum — *Gov't Affairs/IRS Liaison/Elections*

(619) 237-7290

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Shirley Henry-Bisantz — *Hall of Fame*

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Val Daigle

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Kevin McCully

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Greta Ward — *Fall Workshops*

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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 Love's Restaurant, I-805 at E Street 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 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.

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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