



San Diego Chapter
5262 Baltimore Dr., La Mesa, CA 91942-2080

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

Dinner Meeting

Date Thursday, June 19, 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 Setup
7:00 p.m. Dinner
7:30 p.m. Speaker continues

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

Menu

- Mahi Mahi
- Salad, Chef's choice
- 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, June 18th, 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 made
via our website will be emailed to you within 24 hours.

If you do not receive a confirmation
please call (619) 698-0508

EDUCATIONAL PRESENTATION

Before & After Dinner

Topic

SMALL BUSINESS TAX BREAKS

Speaker

WILL ROGERS

**CTEC 1000-CE-2438
(1 FEDERAL & 1 STATE CREDIT HOUR)**

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.

IN MEMORY

LYNN DAWN HALL
May 2, 1945-May 15, 2008

Lynn had been a member of ISTC / CSTC
since August of 1986.

PRESIDENT'S MESSAGE

Dear Friends & Colleagues,

Our May Dinner Meeting was very informative with the information that was given us from the County Assessor's office and from Katie Williams of the IRS. Please remember that these speakers are here on their own time with no compensation. Try to give constructive problem solving issues to take back to their offices and let's not dwell on some of your personal problems that you have encountered that consumes time and takes away from our education time.

A reminder that our CSTC San Diego Chapter Office has moved. I will take on the communication responsibilities for the Chapter. Going forward, the chapter's President will take on the responsibilities of the Chapter office.

The CSTC Summer Symposium is being held in Reno on June 2nd, 3rd & 4th at the Silver Legacy. There are always outstanding speakers and topics that are educational. So if you haven't signed up, you still have time. For those of you that fly, they now have non-stop flights to Reno.

Our Member Benefits committee has reformed our member benefits. They are outlined in this month's newsletter (Page 4). The committee worked hard to provide us with all the possible benefits that our chapter can allow, so we applaud them for all their time and efforts in providing us with these valuable benefits. **Thanks to Shirley and Val for your time well spent on these benefits.**

Our Education Chair and committee will be offering classes this year for our **Mini-Symposium** in September / October at the Handlery Hotel. More details will be released at a later date. Greta Ward our Education Committee Chair is always looking for topics that are in need.

On September 8th, at the Handlery Hotel, the Society Education Committee, which I am a member of, will be hosting an advanced class on LLC's. This class will be held prior to the IRS Forum at the Town & Country Hotel, on September 9th, 10th & 11th. This is the IRS Forum that is usually held in Anaheim.

We are in need of volunteers to step up and resume responsibilities that some of us have had for years and are ready to step down. A few of us NEED a break and looking forward to it, as the old step down and the new step up to assume the responsibilities. We have had new members volunteer and we need more to continue our path of new ideas. This organization can only continue to operate and be successful, if **YOU** as

volunteers care and do your part. So give me a call if you are interested.

Point of Contacts. You can always reach someone, either myself or the Board of Directors. Our names and positions as well as our phone numbers are published on the last page for your convenience. Please use that list to contact us with your questions or concerns.

Rose Carter
Chapter President

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

Also tell them about the 1040 Running Start Seminar January 8 & 9, 2009.

BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is **Thursday June 19th, 2008, 4:00 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.

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.

INTEREST RATES

As of July 1, 2008 interest rates for individual underpayments are Federal 5% and California 7%. (Rev Rul 2008-27, www.irs.gov/pub/irs-drop/rr-08-27.pdf/www.ftb.ca.gov/individuals/faq/ivr/617.shtml).

*My wife made me get these glasses.
I wasn't seeing things her way: Mark Klein*

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 July 2008 issue is June 25, 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. Limited to six lines. Subject to available space and the discretion of the editors.

2008 MEETING DATES

July 8 (EA hosted joint meeting)
Medi-Cal planning, Estate planning
w/Medi-Cal & Reverse Mortgages

August 21

CHUCK WOODSON - Foreclosures

September 18

SYLVIA LANG - Ethics

October 16

San Diego Chapter's 33rd Anniversary

LYNN FREER - California Update

November 13

FRANK ACUNA

December 11 (Thursday) - **Holiday Party**

EDUCATION EVENT

*California Taxation of Indian Income
On & Off Indian Reservations*

June 10, 200, Steve Sims & Emily Williams, FTB
Presented by CSEA – San Diego Chapter

Reservations: before 5 p.m. June 5th – call 800-642-1040
or email paulatax@san.rr.com.

CLASSIFIEDS

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.

FOR SALE: 4 - 4 Drawer, black, vertical Hon filing cabinets - excel condition; 1 - black, fire safe, one drawer, file cabinet; 5 shelf, cherry & black wrought iron book shelf; small reception desk, blond, solid wood; 4050 Laser Printer and 3 toner cartridges. Contact Apará Kohls at (760) 436-1296 or e-mail apara@sbcglobal.net.

TAX PRACTICE WANTED TO BUY –
EA seeking tax and/or bookkeeping practice.
Call Tony Applebaum at (619) 237-7290.

ATTENDANCE

May Dinner Meeting 87 Pre-Paid Dinners 44

EA EXAM CANDIDATES

Any member interested in carpooling to EA exam classes in Orange County please contact Terry Smith at Realtaxes@AOL.com.

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.

SOCIETY MEMBERSHIP DRIVE

"2012 BY 2012".

Members who bring in a new member will receive \$25.00 CSTC education voucher from Society.

NEW — 2008 CHAPTER MEMBER BENEFITS — NEW

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, 2099 only. No exceptions. (Coupons have no cash value and are not convertible to cash or refunds for previously paid event fees.)

SAN DIEGO CHAPTER COMMITTEES

Our Chapter is the largest in California (currently 207) 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	
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

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.

SAN DIEGO CHAPTER

OFFICERS

President

Rose Carter

(619) 698-0508

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1ST V.P. – Education & Speakers

Terry Smith

(619) 283-8055

E-mail: realtaxes@aol.com

2ND V. P. – Dinner Meetings and Arrangements

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Secretary –

Linda Farmer

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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 Janice Brown at (619) 464-1041. June 12th Topic: Dividends-where & when? Speaker Shakeel Kazi

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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