



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

California Society of Tax Consultants
San Diego Chapter Newsletter • July 2008

Dinner Meeting

Date ***Tuesday***, July 8, 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

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

Requests must be made with reservation

RESERVATIONS

Deadline is ***Noon, Monday, July 7, 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 will
be emailed to you within 72 hours. Reservations made
on a Thursday are schedule to be confirmed
the following Monday.

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

***JOINT MEETING WITH THE SAN DIEGO
CHAPTER OF ENROLLED AGENTS'***

EDUCATIONAL PRESENTATIONS

Before Dinner

MediCal Planning & MediCal Estate Planning

Speakers

Cal Gehring, CSA & David Barnier, Esq

After Dinner

Reverse Mortgage

Speaker

Jerry Sleder

**CTEC 1000-CE-2452
(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.

IN MEMORY

Jim Saleny

Jim passed away on June 4, 2008. Jim had been a member of ISTC / CSTC since 1986.

Jim is survived by his wife, Marilyn.
If you wish to send a card, Marilyn's address is 1626 Oak View Terrace, Bonita, CA 91902.

PRESIDENT'S MESSAGE

Dear Friends & Colleagues,

I want to welcome our 4 new members, **Jan Brown, Sandi Brooks, Janette Mahnken and Diane Rea.** Welcome Ladies. I hope that CSTC is the organization that broadens your scope of networking along with the great members that you will meet as well as our outstanding continuing education that we provide.

San Diego Chapter will definitely make a statement if we can bring in 2 members a month. Let's all reach out and speak to those licensed preparers that need an organization to come to for education and networking.

Our Education Committee will be offering classes this year for our **Mini-Symposium** on October 2nd & 3rd at the Handlery Hotel. Limited seating will be available. More details will be released at a later date. Greta Ward our Education Committee Chair and committee are putting together a great 2-day Seminar. We will have the flyers out at our July meeting.

On September 8th, at the Handlery Hotel, the Society Education Committee, which I am a member of, will be hosting an Intermediate / Advanced class on LLC's by Beanna Whitlock. She is out of Texas, and has been speaking for CSTC and the Summer Symposium for years. This year the IRS Forum will be at the Town & Country Hotel, on September 9th, 10th & 11th. By now those of you that have attended in the past should have received flyers in the mail.

We are in need of volunteers to step up and assume 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.

The Board of Directors is a perfect point of contact. Our names and positions as well as our phone numbers are published on the last page for your convenience. Please use that list with any 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.

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.

TEN CLIENTS YOU DON'T WANT

The FTB recently published the top 250 taxpayers with liened state tax delinquencies greater than \$100,000. Here are the top ten in San Diego County:

Don L & Susanne C Ballantyne	\$2,868,549
William P & Patricia D Johnson	2,128,002
John Hines	1,093,964
Manuel Acevedo	670,210
Daniel J Leroy	495,630
Mark T Bruno	442,579
Patricia S Bollles	336,008
Edward J Bodek	308,467
James E Brill	300,671
Neil D Kravetz	299,566

The entire list is at FTB.Ca.Gov/individuals/txdlqnt

WELCOME NEW MEMBERS

Sandi Brooks, Jan Brown,
Maritza Furtado, Janette Mahnken,
Diane Rea

SOCIETY MEMBERSHIP DRIVE

"2012 BY 2012"

Members who bring in a new member will receive \$25.00 CSTC education voucher from Society. Current statewide membership is 1161.

BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is **Tuesday, July 8th, 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.

"SUBPOENA" EMAIL SCAM

The San Diego Business Journal has reported that an e-mail scam is targeting executives and other high-profile individuals. The scam involves a fake subpoena from what appears to be the U.S. District Court of the Southern District of California. In reality the court does not e-mail subpoenas.

The FBI says the e-mail attack is the latest "phishing" scheme, an attempt to fraudulently obtain sensitive information from a recipient's computer by masquerading as a trusted source. Do not open e-mail from subpoena@uscourts.com.

HOLIDAY PARTY SPONSOR GROUP

Mari Jo Hughes is looking for a non-profit group this Chapter can support during our Christmas Party. Your suggestions are greatly appreciated. Contact Mari Jo at johughes@pacbell.net.

IRS INCREASES MILEAGE RATES

As of July 1, 2008 the optional standard mileage rates have been increased.

Mileage Rates

	1/1 through 6/30/08	7/1 through 12/31/08
Business	50.5 cents	58.5 cents
Medical/Moving	19 cents	27 cents
Charitable	14 cents	

IRS Announcement 2008-63, Rev. Proc. 2007-70.

CALIFORNIA INDIANS AND CALIFORNIA TAX

Many Californians believe that income earned by the more than 265,000 Native Americans living in this state is exempt from tax. In some cases, this belief is correct. In many other cases, it is a false belief. This often-misunderstood issue is explored in a series of comprehensive questions and answers in the June issue of FTB's Tax News. A copy can be obtained at www.ftb.ca.gov/professionals/taxnews.

REBATE CHECK IS IN THE MAIL

Paper Rebate checks were to be mailed based on the taxpayer's Social Security number.

Last two SSN digits:	Payments will be mailed no later than (and received a few days after):
00 through 09	May 16
10 through 18	May 23
19 through 25	May 30
26 through 38	June 6
39 through 51	June 13
52 through 63	June 20
64 through 75	June 27
76 through 87	July 4
88 through 99	July 11

If you or your clients have any questions about the rebate, call the Rebate Hotline at 1-866-234-2942.

JULY CSTC ANNIVERSARIES

CHRISTY ALMOND	3 YEARS
JOHN CHAN	21 YEARS
SALLY DIVECCHIO	18 YEARS
SHIRLEY HENRY-BISZANTZ	21 YEARS
ROY JOHNSON	18 YEARS
LINDA LADD	31 YEARS
KEVIN MC CULLY	3 YEARS
LESS MERRITHEW	21 YEARS
DAVE MORGAN	1 YEAR
RUSSELL OYLER	15 YEARS
KAMRAN PARVINI	22 YEARS
ROBERT REED	1 YEAR
ESTHER SABO	31 YEARS
LEANORA SANFORD	20 YEARS
FRANK SCHOEN	14 YEARS
TERRY SMITH	24 YEARS
ELAINE SMITH	16 YEARS
TENSIA TREJO	22 YEARS
GENEVA WARD	11 YEARS
JAMES WHALEN	16 YEARS

We thank you for your loyalty to The San Diego Chapter making us 207 strong.

(Besides the 2 named above can you name the other 4 with over 30 years of San Diego Chapter membership?)

*The way to get started is to
Quit Talking and Begin Doing*

Walt Disney

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 August 2008 issue is July 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

August 21

CHUCK WOODSON - Foreclosures

September 18

SYLVIA LANG - Ethics

October 16

San Diego Chapter's 33rd Anniversary

LYNN FREER - California Update

November 20

FRANK ACUNA

December 11 (Thursday) - *Holiday Party*

ATTENDANCE

May Dinner Meeting 87 Pre-Paid Dinners 49

June Dinner Meeting 95

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

IMMEDIATELY AVAILABLE: Share space with three EA's in the Clairemont area. Reasonable cost per sq.ft plus share in utilities and common areas. Kitchen and Storage available and remodeled lobby area for clients. Close to 805 Fwy and Balboa. Call Elaine for details (858) 277-8780 or info@horizonplanning.com.

A VERY ESTABLISHED EA tax practice in La Mesa has one partner who wants to semi-retire. There is an opportunity to take over 300-350 semi-complex tax returns plus possible new clients. Computer skills a plus. Email contact: lamesatax@gmail.com

OFFICE SPACE FOR RENT: Experienced preparer to share space and Lacerte. 8x10 office with window. Available now. 4858 Mercury, Kearny Mesa. Terry Davis (858) 277-1040 or terrydavistax@sbcglobal.net.

EA SEEKING TAX PRACTICE: EA/CFP expanding business. Year-round office, full time staff, tax and financial planning firm. Flexible terms. John Sutherland (619) 464-8474.

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.

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.

TAX EDUCATIONAL EVENTS

Registration Forms and additional information at www.cstcsandiego.org.

Also check out other educational events in San Diego County

IRS NATIONWIDE TAX FORUM

September 9, 10 & 11 • 18 hours CE

At the Town & Country in Mission Valley

More Information:

June issue of the SD EA newsletter, page 4, at

www.cseasandiego.org/ and

IRS website at www.taxforuminfo.com/home.asp

SAN DIEGO CHAPTER MINI SYMPOSIUM

October 2 & 3 at the Handlery Hotel

Foreclosures, 401 K's, Stock Options,

Audits, Preparer Penalties

Buffet Lunch and parking included. 16 hours CE

"1040 Running Start Update" Seminar

8 hours CE

The Best Federal & California Income Tax Update in San Diego County

January 8 & 9, 2009 (Thursday & Friday) - in San Diego

January 10, 2009 (Saturday) - in Escondido

January 6, 2009 (Tuesday) - in El Cajon

East County Chapter: www.cstceastcounty.org

Dinner meeting 1st Tuesday 6 PM at El Cajon Community Center.

8/5/08 - California Update by Lynn Freer & Mortgage Interest with Linda Beckett

9/2/08 - Federal Update by Larry Forsyth & Estate Planning with Gary Quackenbush

10/7/08 - Paperless Office by Jerry Dixon & Jack Miller & HSA's with Dave Gorsich & Mike Karll

North County Chapter: www.cstcsociety.org/NORTHCTY

Dinner meeting 2nd Thursday at Olympic Resort Hotel.

San Diego Chapter: www.cstcsandiego.org

Dinner meeting 3rd Thursday 5:30 PM at Handlery Hotel, Mission Valley.

1/08/09 - *Running Start Seminar*. Dave Gorsich and Mike Karll. 8 hours CE.

1/09/09 - *Running Start Seminar*. Dave Gorsich and Mark Karll. 8 hours CE.

South Bay Chapter: www.cstcsociety.org/SOUTHBAY

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

Temecula Chapter: www.cstcsociety.org/TEMECULA

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

Fiduciary Tax Group:

08/14 – Issues from Pub 559. Dave Persiani

9/11 – Elections. Sylvia Lang

10/9 – California Income for Non California Resident Beneficiaries. Helen Welbourn

11/13 – Issues of GST. Val Daigle

12/11 – New Inherited IRA Distribution Rules. Larry Lloyd

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, 2009 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 Stephanie Matticks	Newsletter	Terry Smith
Elections	Christy Almond Andrea Davis	Nominations	Tony Applebaum
Finance/Budget	Duane Lewis	Operation Manuel	Shirley-Henry Bizantz
Government Affairs	Val Daigle	Quickfinders/Tax Book	Tom Groel
Hall of Fame	Shirley Henry-Bizantz	RIA Books	
Holiday Party	Mari Jo Hughes	Running Start	Marc Lord
		Sunshine	Nadine Allevato
		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

E-mail: racarter@sbcglobal.net

1ST V.P. – *Education & Speakers*

Terry Smith

(619) 283-8055

E-mail: realtaxes@aol.com

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

Stephanie Matticks

(619) 697-2950

E-mail: stephanie007@sbcglobal.net

Secretary –

Linda Farmer

(619) 264-6070

E-mail: laftaxes@pacbell.net

Treasurer – *Finance/Budget*

Duane Lewis

(619) 698-9191

E-mail: duanetaxman@gmail.com

Past President

Tony Applebaum

(619) 237-7290

E-mail: tony@appletaxgroup.com

BOARD OF DIRECTORS

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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

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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