



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

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## San Diego Chapter Newsletter • August 2007

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### ***Dinner Meeting***

**Date** Thursday, August 16, 2007

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**Where** Handlery Hotel & Resort  
950 Hotel Circle North  
Mission Valley, San Diego, CA

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**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

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

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**Menu**

- Caesar Salad
- Chicken Medallions/stuffed with Artichokes, Sun dried Tomatoes & Roasted Pine Nuts
- Angel Hair Pasta/Roasted Red Pepper Coulis
- Dessert, Chef's choice
- Choice of Coffee, Tea, Iced Tea
- **Vegetarian Meal Is Available**

**Requests must be made with reservation**

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### **RESERVATIONS**

Deadline is Noon, Wednesday, August 15th, 2007

On line at [www.cstcsandiego.org/is-res.htm](http://www.cstcsandiego.org/is-res.htm),

or call 1-800-994-4782, or

email Rose Carter at [racarter@sbcglobal.net](mailto: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**

#### ***REGISTERED DOMESTIC PARTNERS***

California law requires "Registered Domestic Partners" to file 2007 personal income tax returns as Married Filing Joint or as Married Filing Separate by applying the standards applicable to married couples under Federal Income tax law.

Our dinner speaker will explain how this will be done.

#### **Speaker**

Steve Sims, FTB

#### **CTEC 1000-CE-2189 (2 CALIFORNIA 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,

Our July dinner meeting was a very special event because of the joint meeting with our friends from the San Diego Chapter of the California Society of Enrolled Agents and our presenter was our very own Mr. Dave Gorsich. We had quite a crowd and everyone enjoyed the education as well as the professional affiliations between the two organizations.

**Jim Quilan** is recovering nicely, but it will be a while before he is out of the hospital. **Tish Caliger** is also recouping from her surgery and it will take some time before she is 100% after the rotator cup operation. I had a nice conversation with Tish and a visit with Jim to let them know that members were asking about them and they thanked everyone for their thoughts and well wishes.

This year our Education Committee has put together a **Mini Symposium** for our fall education. We will have two full days of education on September 5<sup>th</sup> & 6<sup>th</sup> at the Pechanga Casino Resort in Temecula. We've had 40 registrations as of July 25<sup>th</sup>, most of which are from the surrounding chapters. We are looking forward to seeing more people from our chapter attend. We need a big push on this event to make it successful. Remember to sign up for this seminar that our education committee has worked so hard at putting together.

Looking forward to seeing you at the **August 16th dinner meeting** to hear about filing returns for "Registered Domestic Partners" from our speaker Steve Sims of Franchise Tax Board.

Rose Carter  
Chapter President

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### BOARD OF DIRECTORS MEETING

The next meeting of the Board of Directors is **Thursday August 16th, 2007, 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 to racarter@sbcglobal.net.

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*If your clients won't leave you  
You must be doing a good job.*  
Dave Gorsich

## OUR CHAPTER NEEDS VOLUNTEERS

**WE NEED VOLUNTEERS - DON'T BE SHY**  
**Currently seeking members for the Nomination committee.**

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.

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### HOLIDAY PARTY

Shirley and Nadine are accepting your nominations for the non-profit organization to be recognized for our Holiday Party slated for Thursday December 13<sup>th</sup>.

Contact Shirley by email at shirley@kachinaranch.com or Nadine by email at nadine8@san.rr.com.

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### 2007 MEETING DATES

**September 20** Dan McAllister, City Treasurer  
**October 18** **Chapter's 32<sup>nd</sup> Anniversary**  
Lynn Freer, California Update  
**November 15** Larry Conway  
**December 13** **Holiday Party**

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### ATTENDANCE

May Dinner, Meeting 102 (previous high 87)  
June Dinner, Meeting 84  
July Dinner, Meeting 92  
Chapter Membership, 218 (July 19th, 2007)

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### 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.

## EDUCATIONAL EVENTS

### SAN DIEGO MINI-SYMPOSIUM

September 5-6, 2007

Presented by the San Diego Chapter of CSTC

15 Hours of Federal & California Credits

- Home Mortgage Interest & Sale of Residence
- Eldercare Tax Issues   ▪ Domestic Partners
- Cancellation of Debt & Foreclosures
- California Differences   ▪ Ethics
- AMT & NOLS   ▪ Bankruptcy
- Tax Professional Legal Issues
- Difference Between LLC, C- Corp. & Sub S
- Retirement Planning   ▪ Year-End Strategies

More information and a Registration Form are available on our website Education Page, or contact Rose Carter at (619) 698-0508 or email to [racarter@sbcglobal.net](mailto:racarter@sbcglobal.net).

### EAST COUNTY FALL WORKSHOPS

Sept 21 & 28 and Oct. 5

3 case studies. (27 hours of CE)

#### Real Estate, Trust & Estate and Corporation Basics.

Same case studies, different outcomes! Why? Case studies will be available for you to download and prepare two weeks before each class.

Presented by the East County of CSTC. Details & registration form at [www.csceastcounty.org](http://www.csceastcounty.org) or contact Ghana Bigsly at 619 801-0331.

### SAN DIEGO CHAPTER OF CSEA EVENTS

- "Mastering Tax Issues for Family Child Care Providers" - August 14
- "Applying Integrated Tax, Estate and Financial Planning" – August 20
- "Tax Treatment of Recourse & Non-Recourse Debts, Short Sales, and Foreclosures" – September 28

More information and registration form on line at <http://cseasandiego.org/newsletters/2007semfly.pdf>.

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### W-2 – BOX 14

Do you wonder what some of those Box 14 Codes mean for your military W-2's?

Box 14, Code W - Social Security Administration (SSA) Wages (Military) SSA wages earned on active duty is informational only. It is supplied to the SSA for "Deemed Military Service Wage Credits" and used to determine future SSA benefits.

Submitted by Larry Lloyd - Source US Navy Payroll.

## IRS NEWS

### E-Filing – 8879 Required / 8453 Revised

Beginning with the 2008 filing season, Tax Practitioners are required the use of Form 8879, e-file Signature Authorization. A new designed Form 8453 will be used to transmit supporting documents that are required to be submitted to the IRS with e-filed returns.

### New Form 8919

The IRS has released a draft version of the new Form 8919, Uncollected Social Security and Medicare Tax on Wages, to be used by workers who are misclassified as independent contractors. Previously the Form 4137 was used. The draft is on the IRS website, [www.irs.gov](http://www.irs.gov).

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## CLASSIFIEDS

### WANT TO DOWNSIZE OR SEMI RETIRE?

I would like to expand my Scripps Ranch Practice. Steve Hughes at (858) 344-0000.

**WANTED: TAX PRACTICE.** EA looking to expand practice in the La Mesa area. If you're thinking of selling all, or a portion of your practice call Kevin at 619-507-7529.

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

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## 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](mailto:cstcsd@san.rr.com). Let us know if you change your email address.

### Newsletter Articles & Advertising

Submit your articles and ads to Terry Smith at (619) 283-8055 or email to [Realtaxes@aol.com](mailto: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 September 2007 issue is August 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.

## SAN DIEGO CHAPTER

### OFFICERS

#### President

**Rose Carter**

(619) 698-0508

*E-mail:* racarter@sbcglobal.net

#### 1<sup>ST</sup> V.P. – *Education & Speakers*

**Steve Comer**

(619) 698-0202

*E-mail:* scomer@tfs-lm.com

#### 2<sup>ND</sup> 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

### 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

*E-mail:* tony@appletaxgroup.com

#### **Shirley Henry-Bisantz — *Hall of Fame***

(602) 224-9038

*E-mail:* shirley@kachinaranch.com

#### **Val Daigle**

(619) 435-3131

*E-mail:* val@westax.com

#### **Mari Jo Hughes**

(619) 397-5360

*E-mail:* johughes@pacbell.net

#### **Kevin McCully**

(619) 507-7529

*E-mail:* kevinmccully@cox.net

#### **Greta Ward — *Fall Education***

(619) 644-1752

*E-mail:* abacus1@juno.com

### CHAPTER OFFICE

7827 Convoy Ct. #403, San Diego, CA 92111-1218

(858) 278-7954 • Fax (858) 278-9327

#### **Newsletter Editor**

**Terry Smith**

(619) 283-8055

*E-mail:* realtaxes@aol.com

#### **Web Site**

**Larry McClellan**

(858) 278-1164

*E-mail:* cstcsd@san.rr.com

## 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** — 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 @ (619) 464-1041.

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### 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:**  
7827 Convoy Ct #403, San Diego, CA 92111  
Tel (858) 278-7954 • Fax (858) 278-9327  
Web Site: www.cstcsandiego.org  
E-mail cstcsd@san.rr.com
- **CSTC SOCIETY OFFICE:**  
2050 W Chapman Ave # 114  
Orange, CA 92868-2648  
Tel (714) 634-0484 • Fax (714) 634-4975  
Web Site: www.cstcsociety.org.  
E-mail: cstcsociety@sbcglobal.net

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### 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.