



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

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

Dinner Meeting

Date Thursday, October 18th, 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

- Salad, Chief's choice
- Roast Prime Rib of Beef
- Twice baked potato, au jus
- 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, October 17th, 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.

NEW

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 800-994-4782

DO NOT MISS THIS MEETING.

San Diego Chapter's 32nd Anniversary
Join the celebration of the chapter's anniversary.

EDUCATIONAL PRESENTATION

Before & After Dinner

Topic

"California Update"

The Up To Date News On California's Tax Laws
Including - Registered Domestic Partners Law And
California's Non-Conformity To Federal Tax Law.

Speaker

Lynn Freer, EA
Spidell Publishing Co.

**CTEC 1000-CE-2253
(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 **September Education Dinner meeting speaker** Kelly Hoang, Attorney was great and she gave us a background of knowledge regarding the IRS. We had a large crowd of 97 in attendance. There were many questions asked and situations proposed to her. She was an outstanding speaker.

We had our **Mini Symposium** at Pechanga with 96 in attendance. The Education Committee wanted me to express their appreciation for your support in this first time having it outside of our area. The program was outstanding as well as the accommodations at the Pechanga Resort. There was quite a positive response to having it again at Pechanga.

Our **October 18th Education/Dinner speaker** will be Lynn Freer, EA, of Spidell, providing us with the latest updates for California. As usual Lynn packs in a full house so be sure to call in to reserve a seat.

After a plea for **volunteers**, I am pleased to announce we received 7 members wanting to serve in any capacity. Thank you.

The **CSTC Society office has moved** to a new location. See page 6 for the new address, phone and fax number.

The **Running Start** is well on its way and the Early Bird registrations are now available.

Looking forward to seeing you at the
October Education/Dinner meeting
to Celebrate our 32nd Anniversary of ISTC/CSTC

Rose Carter
Chapter President

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.

OUR CHAPTER NEEDS VOLUNTEERS

**Looking for new faces to help
at the dinner meeting sign-in desk.**

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 October 18th, 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 @ (619) 698-0508 or e-mail: racarter@sbcglobal.net.

HOLIDAY PARTY

Thursday December 13th

The Board of Directors has accepted the Holiday Party Committee's recommendation that this year's non-profit organization will be the Senior Community Centers. During 2006 the center provided over 328,000 meals to seniors. They also provide assistance with housing, medical, mental health and social service assistance.

The center serves 200 home delivered meals daily and they are gearing up to serve 500 on Thanksgiving and Christmas at three different sites.

Items that seniors can always use are: razors, shaving cream, Ensure, and all types of kitchen utensils.

Kevin McCully and his group "The Players" will provide great musical entertainment again this year at the Holiday Party. Mark Your Calendar for fun and relaxation prior to the tax-filing season.

NEW RESOURCE LIBRARY

Share your in-house worksheets and forms with other CSTC members. Email your in-house forms you will share with members to Larry McClellan at cstcsd@san.rr.com for posting to our website. Attach the documents to your email in MSWord, PDF, or JPG format. Include "CSTC – Forms" as the subject of your email.

Some suggestions received are:

- Client Survey
- Conflict of Interest/Informed Consent
- Engagement Letter
- Escrow Expenses
- Filing Instruction Letter
- Partnership Basis Calculation
- Questionnaire

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.

RUNNING START – January 2008 Save Money

Early Bird Running Start registration forms will be available *only* at our September & October Dinner meetings. If you attended the September dinner meeting and need a registration form contact Randy Dahlin at 619-697-3000 or e-mail RWDahlin@AOL.com.

**YOU MUST BE A CURRENT CSTC MEMBER
TO QUALIFY FOR THE EARLY BIRD PRICE**

2007 CHAPTER MEMBER BENEFITS

Any San Diego Chapter member who attends four San Diego Chapter Dinner Meetings between May and September 2007 will be entitled to a 50% discount off the regular price of the 2008 Running Start.

The 2007 San Diego Chapter Member benefits are posted on our website and in the February 2007 chapter newsletter. There are nine member benefits designed to make your education more affordable. Most benefits only require you to attend our dinner meetings.

RIA MASTER TAX GUIDES

Orders must be received by October 9, 2007.

Special chapter member prices on RIA Master Tax Guides. Check out the order form on the Tax Office Management page at our website www.cstcsandiego.org.

Contact Christy Almond if you have questions, (619) 237-7290.

QUICKFINDERS & THE TAX BOOK

Orders must be received by December 1, 2007.

Special prices on Quickfinders Books & The Tax Book.

Pick up locations have changed, please go to Tax Office Management page at www.cstcsandiego.org for details. Please contact Tom Groel (619) 698-9191 or email tomtaxman@gmail.com to advise him of your location at which you will pickup your order.

RESCHEDULED TAX CLASS

**"APPLYING INTEGRATED TAX, ESTATE AND
FINANCIAL PLANNING"**

NEW January 18TH, 2008, 8:30-3:30 at National University, 9388 Lightwave Ave, San Diego 92123 Presented by CSEA San Diego Chapter. Contact Elaine Smith at (619) 562-7671.

NORTH COUNTY CLASSROOM SERIES

"LLC'S AND PRACTICE MANAGEMENT"

See the "Education" page on our website for complete details, Oct 14 & Nov. 14, 2007.

IRS NATIONAL PHONE FORUM IDENTITY THEFT

Participate in this no cost presentation on October 17, 2007 at 8 AM, 10 AM (Spanish) or 12 PM from your office. Register at www.attevent.com by Friday October 12. Continuing education hours offered.

NEW ID NUMBER PROCEDURE

IRS has again changed the on-line procedure for obtaining an Employer Identification Number (EIN). This version of the procedure will only take "minutes" according to IRS.

Go to www.irs.gov and select the link to "Online EIN application it's fast and user-friendly" located on the left side of the home page.

You can now print and save their confirmation notice, instead of waiting for the IRS to mail it.

IRS TO EMPLOY THE BLIND

The IRS and Lions World Services for the Blind will train blind and visually impaired candidates for positions within the IRS. (IR-2007-162)

CLASSIFIEDS

TAX SPECIALIST NEEDED: San Diego office seeking EA for next season. 5+ years experience with Federal and Cal returns and be familiar with Lacerte and Quickbooks. Full time Feb 1 thru April 15, 2008. Send resume and salary history to Cheryl@sdctax.com.

NEED A “RETROSPECTIVE APPRAISAL”? Value for date of death, estate planning, divorce settlement, refinance or purchase? Licensed by CA and a Certified Residential Real Estate Appraiser. Call Skip DeGreef at (619) 977-7547. CSTC member.

LOOKING FOR MORE CLIENTS: East County preparer looking to expand. Contact Steve Comer at (619) 698-0202

FOR SALE-OFFICE FURNITURE. Beautiful natural wood, high-end three-sided desk with glass top, two drawer natural wood credenza filing cabinet and chairs. All high quality for that look of success. Joe Foti at (619) 465-4739.

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.

ATTENDANCE

May Dinner Meeting	102
June Dinner Meeting	84
July Dinner Meeting	92
August Dinner Meeting	96
September Dinner Meeting	97
Pechanga Mini Symposium	96
Chapter Membership	198 (September 2007)

2007 MEETING DATES

November 15
Topic to be announced.

December 13
Holiday Party

NEWSLETTER ARTICLES & ADVERTISING

Submit your articles and ads to Terry Smith at (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 November 2007 issue is October 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 editor.

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 your email address.

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.

TAX EDUCATIONAL EVENTS

Also check out educational events in San Diego county listed at www.cstcsandiego.org.

East County Chapter: www.cstceastcounty.org

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

10/2 Dinner topic-Ethics. Albert Cruz. 2 hours CE.

10/5 Corporations Basics. Paula Armstrong, EA. 9 hours CE.

11/6 Dinner topic-Estate Planning. Gary Quackenbush, Atty. 2 hours CE.

1/8/08 Running Start. Dave Gorsich and Mike Karll. 8 hours CE.

North County Chapter: www.cstcsociety.org/NORTHCTY

Dinner meetings 2nd Thursday at Olympic Resort Hotel.

10/11 Dinner topic-IRS Sr. Stakeholders. Lori Cacioppo. 2 hours CE.

10/14 Classroom series: LLC'S-Are they the Entity of Choice? William Rogers, EA,CFP,MBA 6 hours CE. Email: pamelamcgrath@yahoo.com

11/14 Classroom series: Practice Management: Building Your Competitive Advantage. William Rogers, EA, CFP, MBA 6 hours CE. Email: pamelamcgrath@yahoo.com

11/8 Dinner topic-Prob. Issues with Sch C. Anthony Bustos, EA. 2 hours CE.

1/5/08 Running Start. Dave Gorsich and Mike Karll. 8 hours CE.

San Diego Chapter: www.cstcsandiego.org

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

11/15 Dinner Meeting, Topic & Speaker to be announced.

1/03/08 Running Start. Dave Gorsich and Mike Karll. 8 hours CE.

1/04/08 Running Start. Dave Gorsich and Mark Karll. 8 hours CE.

South Bay Chapter: www.cstcsociety.org/SOUTHBAY

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

10/23 Dinner topic-TBA

11/27 Dinner topic-TBA

Temecula Chapter: www.cstcsociety.org/TEMECULA

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

10/3 Dinner topic-TBA

11/7 Dinner topic-TBA

12/12 Dinner topic-Ethics. John Keil, EA. 2 hours CE.

CSTC Society: www.cstcsociety.org

12/3 & 12/4 CSTC Tax Bridge to 2008 16 hours CE.

CSEA – San Diego Chapter: www.cseasandiego.org

Dinner Meetings the 2nd Tuesday of each month, May through January

Educational Events are posted at www.cseasandiego.org/pages/events.html.

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

(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 — *Nominations*

(619) 237-7290

E-mail: tony@appletaxgroup.com

Shirley Henry-Biszantz — *Hall of Fame*

(602) 224-9038

E-mail: shirley@kachinaranch.com

Val Daigle — *Gov't Affairs/IRS Liaison*

(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/Speakers*

(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 — 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.

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 92111-1218
Tel (858) 278-7954 • Fax (858) 278-9327
Web Site: www.cstcsandiego.org
E-mail cstcsd@san.rr.com
- **CSTC SOCIETY OFFICE:**
NEW Address, Phone & Fax
12419 Lewis St #106
Garden Grove. Ca 92840-4672
Tel (714) 750-2782 • Fax (714) 750-2722
Web Site: www.cstcsociety.org.
E-mail: cstcsociety@sbcglobal.net