



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

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

Dinner Meeting

Date Thursday, November 15, 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
- Pecan Crusted Chicken Breast
- Wild Rice Blend
- 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, Nov. 14th, 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

EDUCATION PRESENTATION

Before and After Dinner

Topic
SELF EMPLOYED ISSUES

Speakers
KATIE WILLIAMS & LORI CACIOPPO
Internal Revenue Service

CTEC 1000-CE-2275
(2 FEDERAL 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.

IN MEMORY

Gail Markland, passed away on October 22nd.
Gail had been a member of CSTC since 1987. The
members of CSTC wish to express their condolences
to her husband Joe and to her family.

NEW

"ANOTHER" POSTAGE INCREASE

The cost to mail tax returns weighing over 13 oz
to clients has increased. See the article on page 6.

PRESIDENT'S MESSAGE

Dear Friends & Colleagues,

I would like to express our feelings of concern to all on behalf of all CSTC members that were affected by the horrific fires that hit San Diego and the surrounding areas. I hope that all are safe and if you were displaced by this event, if there is anything that our chapter can do to help, please don't hesitate to call. I know of several colleagues that were displaced by the fire. Please let us know if we can be of any assistance.

As all of us know, we all will be affected by this in one way or another, with family, friends or helping our clients out with forms or advice they may ask of us. So we may want to educate ourselves on the tax rules of disaster and casualties.

On another sad note, a long time CSTC member, **Gail Markland** passed away this week. We send out our deepest condolences to her husband and family.

Our October Education dinner meeting was a success with Lynn Freer and Bob Spidell. As usual Lynn had the audience captivated and gave us a lot of information in her presentation. Everyone enjoyed her and had many many questions that she addressed in between and after the meeting. We had an outstanding showing of 126 members that attended. There were 11 past presidents in attendance and Ed Dunn gave a little background on one of the very ISTC first meetings.

We had a few other guests that we hope will join in the future that enjoyed the presentation and 2 new members that signed up that night. The new members are: **Jeffrey Dean and Richard Smith, son of Terry Smith our editor.**

At our October dinner meeting we had 59 sign up for the Running Start Early Bird.

Looking forward to seeing you at the November 15th dinner meeting.

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 November 15th, 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.

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.

2007 CHAPTER MEMBER BENEFITS

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.

MEMBER BENEFIT CHANGE

Due to book ordering deadlines the Board of Directors voted on October 18th to eliminate the choice of ordering a Quickfinder or Tax Book 1040.

Member benefit #6 now offers a Free Quickfinder **ONLY** for members who meet the qualifications.

NORTH COUNTY CLASSROOM SERIES PRACTICE MANAGEMENT

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

ANNOUNCEMENT FOR EA'S

The IRS Office of Professional Responsibility has begun to notify EA's of its intent to begin publicly disclosing individual EA information.

The disclosure consent check box no longer exists on Forms 23 and 8554. OPR now claims it has the authority to disclose the information under a new privacy policy.

At first, OPR will disclose information for EA's who previously consented on Forms 23 and 8554, new EA's and EA's who renew their enrollment this winter. All other EA's will be added to the public list as they renew their enrollment in future cycles.

The disclosed information (names and mailing addresses) will be released only to CPE sponsors and professional associations. If you are concerned that your address currently on file with OPR is your home address, there is plenty of time to request it be changed. Go to www.irs.gov/taxpros/agents/article for details.

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.

NATIONAL RESEARCH PROGRAM

The IRS is now sending letters advising 13,000 randomly selected taxpayers that their 2006 return has been selected for audit as part of the latest National Research Program study. Tax research on individuals needs updating because as time passes, patterns of noncompliance change. The data obtained will enable the IRS to audit fewer taxpayers with accurate tax returns, which lessens the burden on compliant taxpayers.

FRANCHISE TAX BOARD POSTINGS

The state's Franchise Tax Board launched a web site last week listing the names, addresses and past-due amounts of its worst 250 scofflaws. Among California's most delinquent: singer Dionne Warwick, \$2.7 million, comedian Sinbad, \$2.1 million and O.J. Simpson at \$1.4 million.

Combined the 250 owe more than \$249 million with Rapid American Corp at the top of the list owing \$26.8 million in back taxes.

Prior to going public the FTB had collected \$300,000 in payments from those on the list.

AFFILIATION

At the CSTC Society Board of Directors meeting held 16 July 2007 a proposal to become the affiliate California chapter of the National Society of Tax Professionals (NSTP) was approved to take effect immediately.

NSTP is a non-profit organization founded in 1985 for tax professionals. There is no merger or acquisition of either organization. There will be separate and joint education events with NSTP.

NSTP's current membership is 5,310 with 475 members located in California.

ELECTIONS

Ballots for the Chapter Officers and Board members will be mailed out early November. Ballots must be returned by November 30th.

CLASSIFIEDS

TAX PREPARER OR ACCOUNTANT needed for upcoming season. Experience required with personal tax preparation. Full payout Full/Part time available. Vista office. Fax resume to (760) 643-4164 or tlenhoff@fwg.com.

OFFICE SPACE KEARNY MESA: Available 12/15. Lease required. Contact Elaine Woodson (858) 277-8750, Tue-Thur 9-5.

TAX PREPARER: Coronado office seeking EA or CTEC with 3+ yrs exp. and familiar w/Lacerte. Duties include data input of mail-in/drop-off clients. Hours flexible, Feb 1 thru April 15th. Fax resume w/salary history to (619) 435-4657 or info@westax.com.

1041 FIDUCIARY CLIENTS: Very experienced preparer looking for more 1041 clients. Intimidated by these returns or just not comfortable preparing them? I am interested in purchasing just the 1041 work. Val Daigle (619) 435-3131 or val@westax.com.

FOR SALE: Brand new Bali 1" metal blinds (2), 28"Wx48"H, Alabaster, ext mount hardware, \$25 or both for \$40. Call (619) 435-3131.

OFFICE SPACE-SCRIPPS RANCH: 10.5 X 14.75. Atrium view, large windows, full service. Email: Les@fee-only-planner.com or (858) 547-1845.

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 (619) 977-7547. CSTC member.

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 (619) 463-3611 x 305.

WANT TO DOWNSIZE OR SEMI RETIRE? I would like to expand my Scripps Ranch Practice. Steve Hughes (858) 344-0000.

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

ATTENDANCE

May Dinner Meeting	102
June Dinner Meeting	84
July Dinner Meeting	92
August Dinner Meeting	96
September Dinner Meeting	97
October Dinner Meeting	126
Pechanga Mini Symposium	96
Running Start Early Birds	81

Chapter Membership 201 (October 2007)

WELCOME NEW MEMBERS

SANTO ALOISI	BONNI BARRON
JEFFREY DEAN	JONATHAN LEA
DAVE MORGAN	RICHARD SMITH

2007 MEETING DATES

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 December 2007 issue is November 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.

TAX EDUCATIONAL EVENTS

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

"1040 Running Start Update" Seminar
The Best Federal & California Income Tax Update in San Diego County
January 3 & 4 (Thursday & Friday) - in San Diego
January 5 (Saturday) - in Escondido
January 8 (Tuesday) - in El Cajon

2008 Quickfinder Seminar
January 9 - Presented by CSTC South Bay Chapter

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
Presented by CSEA San Diego Chapter. Contact Elaine Smith at (619) 562-7671.

East County Chapter: www.cstceastcounty.org

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

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 meeting 2nd Thursday at Olympic Resort Hotel.

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

11/15 Dinner Meeting, Self Employed Issues. Katie Williams & Lori Cacioppo, IRS. 2 hours CE.

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

11/27 Dinner topic-TBA

1/9/08 - 2008 Quickfinder Seminar

Temecula Chapter: www.cstcsociety.org/TEMECULA

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

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.

UNITED STATES POSTAGE – DOMESTIC MAIL

Rates as of May 14, 2007 • Rules as of July 29, 2007

Ounces (up to)	Letter Rate	Large Envelope Rate ***	
1	\$.41	\$.80	
2	.58	.97	
3	.75	1.14	
3.5	.92	1.14	
4	**	1.31	
5	**	1.46	
6	**	1.65	
7	**	1.82	
8	**	1.99	
9	**	2.18	
10	**	2.33	
11	**	2.50	
12	**	2.67	
13	**	2.84	**** Note Below
14	**	3.01	**** Note Below
15	**	3.18	**** Note Below
16	**	3.35	**** Note Below
Over 16 oz (1 lb)		Starting at \$4.60	Priority Mail

**** All Mail Over 3.5 Ounces Must Use The Rates For Large Envelopes** (aka “Flats”)
– Regardless of the size of the envelope.

***** “Large Envelopes”** are envelopes with one dimension larger than 6 1/8 inches
– Regardless of the weight. See the next page for the definition of “large envelopes”.

****** Mail Over 13 ounces** –

If the mail is over 13 ounces and not over 16 ounces you have a choice of rates:

1. Mail with Postage Stamps or Private Postage Meter - Use Chart above.

NOTE:

- Mail with postage stamps weighing more than 13 ounces:
 - Mail must be brought to an USPS employee at a retail counter in a post office or at a postage contract unit. (The old rule was over 16 ounces)
 - Mail cannot be put into a USPS collection box or for pickup by a mail carrier (The old rule was over 16 ounces).
- Mail with metered postage weighing more than 13 ounces:
OK to use a collection box or pickup by mail carrier.

Or

2. Use USPS’s on-line “Click ‘N Ship’” postage at the priority mail starting rate of \$4.60.
Ok to use collection box or pickup by mail carrier.

Conclusion – The cost to mail tax returns weighing over 13 oz to clients has increased:

- Option #1 — lower postage, requires trip to Post Office
- Option #2 — higher postage, no trip to Post Office.

(Source: USPS Release No. 07-058, July 24, 2007)

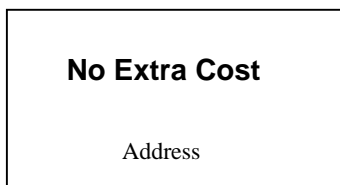
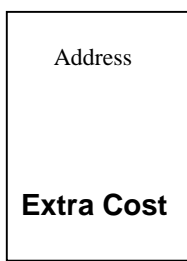
ENVELOPE SIZES

- The small #9 business envelope is 3-7/8" X 8-7/8" – Letter Rate to 3.5 oz
- The standard #10 business envelope is 4-1/8" X 9-1/2" – Letter Rate to 3.5 oz
- 6 X 9 envelopes – Letter Rate to 3.5 oz
- 6-1/2 X 9-1/2 envelopes – Large Envelope Rate
- 9 X 12, 9-1/2 X 12 and 10 x 13 envelopes – Large Envelope Rate

SURCHARGE

A 17-cent surcharge (in addition to the Letter and Large Envelope rates) for:

- Envelope with clasps, string, buttons, or similar closure devices.
- Address parallel to the shorter dimension of the envelope.



- Envelope Too Rigid – does not bend easily.
- Square Envelopes of any size plus an additional 17 cents if envelope is less than 5 inches square.
- Envelope contains items such as pens that cause the surface to be uneven

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-Bisantz — *Hall of Fame*

(602) 224-9038

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

(619) 435-3131

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Greta Ward — *Fall Education/Speakers*

(619) 644-1752

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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.

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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