



California Society of Tax Consultants

CSTC Greater Long Beach Chapter Newsletter

SOCIETY CORPORATE OFFICE

California Society of Tax Consultants
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www.cstcsociety.org

MISSION STATEMENT

To promote professionalism by providing quality educational events for tax professionals, creating and encouraging networking opportunities for members, and advocating professional standards and positions within the tax industry.

GLB Chapter Meetings

Lakewood Country Club
3101 Carson Street
Lakewood, CA 90712

Call for Reservations:
Marie Chambers @ 323/585-9927
Call-in Deadline: The Wednesday prior to the meeting.

Morning Educational Meeting

Cost:
\$30.00 Members with RSVP
\$35.00 Guests & Members no RSVP
Meeting: 8:45 to 12 Noon
January thru April 3 hours CE/ea

Evening Educational Meeting

Cost:
\$35.00 Members with RSVP
\$40.00 Members no RSVP
\$45.00 Guests
Meeting: 6:30 to 9:15 P. M.
April thru November 2 hours CE/ea

For reservations to one of our morning or evening educational meetings, call:
Marie Chambers @ 323/585-9927.

There is no meal guarantee without a reservation. Call-in Deadline: The Wednesday prior to the meeting.

If you have not yet signed up on our Permanent Meeting List and wish to do so, please contact Marie Chambers @ 323/585-9927

The Greater Long Beach Chapter of CSTC meets monthly and offers Continuing Education. Our Chapter has over 90 members, which includes CTEC registered tax preparers, Enrolled Agents, CPA's, and others in the tax profession. If you are looking for tax knowledge, how to manage your business, or want to share experiences and networking with statewide tax professionals, you should attend one of our events.

COMIC CORNER

"Isn't it appropriate that the month of the tax begins with April Fool's Day and ends with cries of "May Day!"?"

Rob Knauerhase

Upcoming Meetings and Events:

- 04/28/10:** CA Sales Tax Issues
- 05/26/10:** Understanding Estate Planning and Estate Tax
- 06/30/10:** TBA
- 07/28/10:** TBA
- 08/25/10:** Lynn Freer: CA Tax Issues
- 09/22/10:** David DuVal on Ethics
- 10/27/10:** Practice Management, Roundtable Discussion
- 11/17/10:** TBA
- 12/15/10:** Holiday Party, Installation of new Officers & Board Members

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Menus:

04/28/10: Italian buffet – Caesar Salad, Penne, Linguini and Cheese Tortellini served with Alfredo, Pesto, and Marinara sauce, Meatballs and Italian Sausage, Garlic Bread

05/26/10: Plated – Salmon served with Mustard Dill sauce, Rice Pilaf

06/30/10: Mexican buffet – Tortilla Chips and Salsa, Mexican Caesar Salad, Chicken fajitas, Refried Beans, Mexican Rice, Pico de Gallo, Guacamole and Sour Cream

07/28/10: Plated – Grilled Chicken with Lemon Herb Sauce, Garlic Mashed Potatoes

08/25/10: Pasta buffet – Seafood Fettuccini with Bay Shrimp and Scallops, Pasta Primavera

09/29/10: Italian buffet – Caesar Salad, Penne, Linguini and Cheese Tortellini served with Alfredo, Pesto and Marinara sauce, Meatballs and Italian Sausage, Garlic Bread

10/27/10: Plated – Pork Loin with Caramelized Pearl Onions and Pan Drippings, Rice Pilaf

11/17/10: Plated – Turkey, Pecan Stuffing, Giblet Gravy, Cranberry Relish, Mashed Potatoes

12/15/10: Plated – Honey-Maple Glazed Ham, Sweet Potatoes

All dinners include salad and dinner rolls (except Mexican dish comes with tortillas) and dessert. **Fish and vegetarian dinners are available upon special request with reservations.**

Vegetarian dishes are usually: Penne pasta w/marinara and steamed vegetables.
Chefs "choice" Fish.

Greater Long Beach Chapter Officers and Board Members**PRESIDENT:**

Dennis Kaho, 562/421-8523

1st VICE PRESIDENT:

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Carol Lalli

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Bob Mitchell, 714/622-3188 x 271

bob.mitchell@nrservices.com

President's Corner . . .**Meet Dennis Kaho**

Dennis has been with CSTC GLB for many years, and has served as a Board Member for the past several years. He has a tax and financial service practice in Lakewood, California, and is the current CSTC GLB Chapter President. Here's what Dennis has to say:

"As usual, it has been an interesting filing season with all of the tax law changes. I was able to use the new homeowner for several clients. Free money is always good!

The Chapter "Breakfast Series" has been well attended this year. Looking forward to the Chapter evening meetings starting this month of April. Dennis "

1st Vice President . . .**Meet John "Jack" Murrill, CPA**

Jack has been a CPA since 1970. He has been in business for 33 years, and his practice is located in Cypress.

Jack has been a member of CSTC GLB since 2005, and he is currently serving as our 1st Vice President.

Jack is responsible for putting together the wonderful selection of speakers providing our chapter members with valuable information about current tax law and other issues which may affect our clients.

Join us April through December for an evening of professional education. Dates, scheduled speakers, and tentative menus may be found on pages 1 – 2 of this newsletter.

Society . . .**Meet Nikki LeBrun, EA**

I've owned and operated my tax practice since 1988 and have been doing taxes and bookkeeping since 1972. The majority of my tax practice is with small businesses and rental real estate, both residential and commercial. I also deal with several other states besides CA.

I've been an active member of ISTC/CSTC since April 1995. I served on the SGR/GLB Chapter BOD as our chapter liaison to the Society BOD in 1998, as 1st VP & liaison in 1999, as President in 2000, 2001 & 2002, as Past President in 2003 & 2004 and currently serve as a Volunteer and Mentor on our BOD. I am also mentoring 2 of our new GLB members.

At the Society level I was the Symposium Education Chair in 2000. Since 2001, I continue to serve as Chair for the Summer Symposium event and in 2008 added On-Line Education to the list of committees. I was elected as Society Treasurer for 2003 thru 2007, 1st VP in 2008 and currently I'm in the second year of my term as your Society President. In 2002 I was honored to receive the CSTC "Member of the Year" award.

Please visit [Notes from Nikki](#) later in this newsletter for the Society Calendar, Society News, and a very important message to all CSTC GLB chapter members.

Membership Corner . . .

Meet Stephen L Bruce, CTEC

Steve has been preparing tax returns now for 28 years, and his main practice is located in Seal Beach, but he prefers to hang out in his home office (shhhhh! That location is a secret!). He is a long-time-member of CSTC GLB, and is one of the 7 CSTC GLB chapter Directors.

Those of you who have already met Steve during our Roundtable sessions the beginning of this year know that he is anything but shy.

Read on to learn a little bit more about our one and only Stephen L. Bruce:

"My main office is located at 239 Seal Beach Blvd, Suite A, Seal Beach, Ca 90740, but my home office is where I hang out..."

My first year preparing tax returns was 1982 - I prepared a total of 12 returns that year.

I have been with ISTC/CSTC a long time. My best guess is I joined our chapter in 1988 or 1989. I originally joined the OC chapter around 1984 but did not participate much and attended meetings for 6 months.

I am currently one of the GLB directors and past president.

As director in charge of membership, my monthly column is meant to catch the reader's attention, be easy to read and hopefully be fun. One of our primary goals in addition to continuing education and networking is to keep our Society strong and viable. This is the responsibility of every one of us. If this column can be a gentle reminder and we all get the message, the job is easy and everyone gets to contribute just a little instead of just a few doing most of the work

I am currently semi-retired and working with approximately 100

complex, long-term clients. My associate, Carol Lalli, is working with approximately ¾ of my tax-client base in the main office.

Part of the reason for my so-called semi-retirement was to have the time to meet with my financial planning clients; to this end I have joined a new broker-dealer, Next Financial Group.

It is interesting to discover that the number of hours I work as a semi-retired person is the same as when I worked full-time,...Go Figure."

Happy Birthdays to:

April:

Krystyna Hollingsworth, Antonia Ramos, Joan Whittaker, Shobha Bajaj, Carol Lalli, Hank Wang, and *new members* Rene Zamorano and John Ghaly

Meet Hal LeMaster, EA

Hal has been in business for 34 years, and his practice is located in Garden Grove.

Hal has been a member of CSTC GLB since 2005, and he is one of our Past Presidents.

Hal has taken on the position of welcoming our new members, and acknowledging each in our newsletter with a birthday announcement. Take time out to peruse Hal's Birthday Corner and perhaps send a warm, birthday wish to your peer-members. Hal is also currently serving as our chapter web-master. Log in today and check us – that includes YOU – out! [CSTC GLB on the WEB](#) (control click to follow link)

Please read on for a short bio of Hal LeMaster, EA:

"Hal has over 34 years of fiduciary tax experience in the trust banking industry and at two CPA firms. He started at Bank of America's Trust Tax Department in 1971 and was promoted to Trust Tax Officer in 1977. Hal's main duties were the preparation and review of Fiduciary Income Tax Returns for the Bank's

Trust offices in San Diego and LaJolla.

In 1979 Hal passed the Enrolled Agent's examination and got his Master's degree in Taxation at Golden Gate University in Los Angeles in 1984. He left Bank of America in 1983 and started at Windes & McClaughry Accountancy Corp., in Long Beach as a Tax Supervisor. For seven years he prepared Fiduciary Income, Federal Estate, Gift, and Final Decedent's Income Tax Returns. He also prepared returns for Charitable Trusts, Exempt Organizations, and Private Foundations.

In 1990 Hal returned to Trust Banking with Security Pacific National Bank, which became Bank of America in 1992 by merger. In 1994 Bank of America's Trust Tax unit was outsourced to its auditors, Ernst & Young LLP for five years and in 1999 Hal was brought back to Bank of America with the merger of Nations Bank.

Hal has also prepared taxes as a part-time self-employed individual since 1976. This tax season is Hal's eighth year as a full-time self-employed preparer and in September 2001 Hal opened up his first business office outside his home.

Hal's office is Garden Grove and is the second time he was past President of Greater Long Beach Chapter of the California Society of Tax Consultants."

Chapter News . . .

Meet Donna Miller, EA

Donna is currently practicing in Signal Hill.

Donna has been a member of CSTC GLB since 2004, and is currently serving as our chapter Secretary.

Here's what Donna has to say about her journey in the tax industry:

"When I took my first tax class in college in the late 70's I knew that I had found something that I love to study. I started my tax career with the State of Kansas when I

graduated and have been in the field ever since.

Most recently I joined Long Beach Business Services, Inc. located in Signal Hill. I have been with the firm for five years. Prior to that I had a free-lance career doing taxes; and prior to that (in Portland Oregon) I was a co-owner of a small tax firm.

I joined the Greater Long Beach chapter in 2004 and joined the board as a volunteer shortly thereafter. In past years I have served as a director and 1st vice president.

I currently serve as the chapter secretary. I am looking forward to the upcoming year and my monthly opportunity to update you about chapter current events in my newsletter column."

Chapter Directors . . .

Meet our precious Marie Chambers

Though you may never have been formally introduced, you will have no trouble recognizing Marie, as she greets you,

"You are precious in God's eyes, and you are precious in mine."

Chapter Volunteers . . .

Meet Shirley Blanton, EA

Shirley Blanton is an enrolled agent who practices in the Long Beach area. She has been doing taxes since the early 80's.

Shirley has previously served the board as a director and as a volunteer. Most recently she is our back-up for assisting with the annual Christmas party.

Meet Robert "Bob" Mitchell, EA, COPA, Chief Actuary

Retirement planning is an area which affects everyone, is studied by many, but has been mastered by very few. As such, the 21st Century tax preparer has come to rely upon advice from specialists in the field. For CSTC Greater Long Beach

chapter members, the Go-To-Guy for all retirement plan questions is Robert "Bob" Mitchell.

Bob lives in Downey with his wife, Arnita, and their two children. He is a graduate of Cal State Long Beach, with a major in Mathematics and a minor in Computer Science.

Bob has 41 years experience as an actuary, evaluating finances, insurance and employee benefits. He attained membership in the Society of Actuaries in 1971, and received his Enrolled Actuary credential in 1976. Bob continues his memberships in several local, civic and fraternal organizations.

Bob is a specialist in retirement plan design, funding, and taxation. He is Chief Actuary at National Retirement Services, Inc. – in business since 1923, headquartered in beautiful Huntington Beach, California, with clients and offices nationwide. He serves as a third party administrator of retirement plans, including 401(k), 403(b), Defined Benefit and Profit Sharing plans.

From Traditional vs. ROTH IRA questions, to choosing between a Defined Benefit Plan or a Defined Contribution Plan, Bob has – or will get – the answer. On more than one occasion, Bob has provided continuing education presentations on the subject of Retirement, Pension & Taxes.

Meet Your Newsletter Editor . . .

Meet Jen Horton, EA - proud to be your CSTC GLB Newsletter Editor

I am currently practicing in my hometown of Manhattan Beach. In 2003 I was attending college when I took a position as an intern with a local CPA. I soon found that I no longer desired to go back to industrial accounting – I enjoyed the work I was doing in tax. In 2005 I quit my job and studied full time 4 months for the EA test. I passed the grueling 2-day test that year, and doors began to open.

In 2008 while in attendance at the IRS Tax Forum, I began searching for a tax networking group to join. I

considered many – CSEA, NAEA – then I met Nikki LeBrun, the current CSTC Society President. She was quite persuasive in convincing me that I would not regret the 15 mile drive to Lakewood to be a part of the Greater Long Beach Chapter – and to that end she was correct.

I consider CSTC – particularly our chapter meeting style and the tax season Roundtable format – to be one of the most pleasant and entertaining sources of continuing education I receive with regard to changing tax laws. In 2009 I attended the CSTC Summer Symposium for the first time, and it was fabulous – valuable tax information, terrific people, and Grrrr-e-a-t Fun! I even made a few 'strikes' at the evening bowling tournament! I would encourage everyone to attend the annual CSTC Symposium, where learning is indeed FUN!

I am happy to be a part of CSTC, and giving back with my services of Editor for the 2009-2010 season. I hope you enjoy reading my columns, "Did YOU Know???" and "What Do You Think?" and I hope you will all participate in the monthly questions put to the membership.

I consider it a great honor to be welcomed into such a wonderful and caring family as this organization provides. CSTC is genuinely unique in the hustle and bustle of our 21st Century society, and I hope you are all as proud to be a part of this organization as I am.

Aloha & Mahalo – Jen Horton, EA,

Notes from Nikki. . .

(Your Editor, as well as Nikki, would ask that if you read nothing else in this newsletter, you read to the following short Note... Thank you.)

NOTE TO ALL GLB MEMBERS:

Following our Morning Education Meeting on March 21st, in which Lynn Freer was our guest moderator for the last hour to update us on California issues, I received the

following letter from Lynn (this is excerpts of what she wrote but it will give you the basic content) :

"This week we have had a serious problem with one of your people's clients. One of the folks at the breakfast meeting told a client to call Spidell or find me to answer a very complex question about the refund of severance pay taxes. The person called numerous times and posted the question to the message board. Unfortunately, the question as originally posted didn't get answered the way he wanted because it was worded wrong. He proceeded to call and yell at my staff three times.

We suggested websites to research and he rewrote the question and reposted it. I answered it with a referral back to the tax preparer.

Can you please tell your people that referring customers to us is not a good idea. First, we don't do work for taxpayers directly and second, if they do, we are going to refer them to a new practitioner. We also blocked his user name and password to our site as the message board is designed for tax professionals."

Lynn was very upset about this situation and the way she and her staff were so rudely treated by the "client". No one knows more about California tax law than our colleague and CSTC member Lynn Freer. She has very graciously agreed to attend at least one of our breakfast meetings the last few years to keep us updated on changes in CA tax laws. **Spidell is designated for tax professionals, not our clients!!! Spidell information should never be given to a client to contact them on their own for their own personal questions.** This was inappropriate behavior by a member and his client and hopefully it will not be repeated by anyone else. We value our relationship with Lynn and Spidell Publishing and certainly don't want to jeopardize that relationship in any way. I do not know who is responsible for the actions of the "client" and I don't want to know. However, if you are the person who gave out the Spidell information, I would suggest that you send a note of apology to Lynn and her staff for the bad behavior of your client. I

have sent her our regrets and have followed through on my commitment to Lynn by informing you of this situation that I don't want to see repeated by any member of CSTC.

Society News . . .

The next Society Board of Directors meeting will be held on Friday, May 7th and Saturday, May 8th at the Crown Plaza Resort Hotel, in Anaheim, from 10 AM to 5 PM on both days. This meeting is for all CSTC President's, 1st Vice President's and any other Chapter Board members that want to participate. The first day will include an update from our IRS Liaison on the upcoming national Tax Preparer Registration program and all the Society committees will plan all their strategies for 2010 as well as put into action all those plans for 2010. Please contact Beverly Switzer at the Society office to make your reservations for attendance. Reservations are required.

Time is running out!! If you have not already signed up for the best education event that CSTC sponsors, it's not too late. The 24th Summer Tax Symposium will be at the Silver Legacy Resort Hotel in Reno this year from June 6th to 9th. We have a terrific program lined up and activities to participate in. The price remains at \$390 for members until April 23rd when the prices will go up. If you can't find your brochure, you can go directly to our website at www.cstcsociety.org to register online or contact Beverly Switzer at the Society office at 714-750-2782. Hotel reservations need to be made directly with the hotel by May 5th. The price is \$64 for single or double plus tax. The phone number is 1-800-687-8733 and our group code is CSTC10.

Sunday night's entertainment will be provided by "Patsy DeCline" (back by popular demand) as well as some of our speakers and several CSTC members including our own Stephen Bruce and David Eastis. You won't want to miss anything about this Symposium!!! GLB members will be given an education rebate at the June chapter meeting (the amount to be determined by the BOD at the April meeting).

Following the Symposium on June 10th, also at the Silver Legacy, is our annual Leadership Workshop and you are encouraged to attend. The Leadership Workshop provides insight into our Chapter Guide and how to use it as well as leadership techniques. We also cover committees and what they entail to help you enhance your efforts in your Chapters. Please contact Beverly Switzer at the Orange office to make your reservations to attend. The workshop is free of charge to attendees, but we need a count to order the food.

CSTC has professional-logo-long-sleeved shirts that are for sale. The shirts are \$32 each. If you are interested, please contact Beverly Switzer at 714-750-2782.

Society Calendar

Support Society Education Programs!!!

1/14/10 Society BOD meeting – 500 City Parkway, Suite 100

1/22/10 Year End Reporting DUE for Society

5/7 & 5/8/10 2 day Society BOD meeting – Crown Plaza Anaheim

6/6-6/9/10 Summer Symposium @ Silver Legacy in Reno

6/10/10 Leadership Workshop @ Silver Legacy in Reno

Chapter Calendar . . .

Evening Education Meetings

6 PM – 9:15 PM on:

4/28/10; 5/26/10; 6/30/10; 7/28/10; 8/25/10;

9/22/10 (please note the change in the date);

10/27/10; 11/17/10

Christmas Party & Installation of new Officers on 12/15/10

Chapter News . . .

As of April 12, 2010, the Governor has signed a bill to conform to Federal rules for COD's – with exceptions. Go to the FTB website for information on what is in the new bill.

Greater Long Beach Chapter Benefits . . .

Discount pricing to all Chapter Educational events *with reservations*. Attend the Roundtable **Morning Educational** meetings January through April and bring in your **problem tax returns**. We'll help you find a **solution** to your problem!!

Receive **9** issues of the **Greater Long Beach Chapter** newsletter **free** (via e-mail).

At least **34 hours of quality Continuing Education** offered each year by the Greater Long Beach Chapter.

Attend **9 meetings** from October 2009 to September 2010 and receive a "Free" **resource book discount of approximately \$46**. Chapter Members get **discounted pricing** on all tax resource books.

Wear your **name badge** to the Evening Education meetings and have a chance to receive **half off** the price of your next Evening Education meeting.

Free advertising for chapter members in our chapter newsletter.

Other Chapters' News . . .

FOOTHILL: 1st Thursday of the month. Call Carmen Hustad for information and reservations @ 909/595-6032. Their meetings are held at the American Legion Hall, 14929 E. Clark, City of Industry at 6:00 P. M.

LOS ANGELES: 1st Tuesday of the month. Call George Yen for information and reservations @ 562/947-2918. Their meeting is held at the Taix French Restaurant at 1911 Sunset Blvd. in Los Angeles at 7:00 p.m.

INLAND EMPIRE: 3rd Wednesday of the month. For information and reservations, call 888/853-9670 and leave a message with your request. Their meeting is held at the Double Tree Hotel Claremont, 555 W. Foothill Blvd., Claremont at 6:00 P. M.

ORANGE County: 2nd Wednesday of the month. Call Fred Saah for information and reservations @ 714/879-9880. Their meetings are held at The Phoenix Club, 1340 S Sanderson Avenue in Anaheim at 6:00 P. M.

Chapter Policies:

An important reminder about our chapter policies: Please Review: *In order to get proper credit for your payment, PLEASE note on your sign-in if you are paying cash, or put your check number by your name.*

Another reminder about Chapter policy: meals are **not guaranteed** without a reservation. Call-in Deadline is the Wednesday prior to the meeting.

If you are **unable to attend** a meeting, please call Marie Chambers @ 323/585-9927 by the Call-in Deadline to cancel your reservation, or you will be billed!

All **no-shows** of reservations will be billed back to you, if not canceled by the Call-in Deadline. Our treasurer, Barbara Cleary, will be keeping track of this procedure. The Country Club bills us for all meals reserved and we must pay whether you show up or not. Thanks for your co-operation.

Unforeseen circumstances are always taken into consideration on a case by case basis.

Note to Greater Long Beach Members:

There is a bulletin board available to CSTC members at the CSTC Website, www.cstcsociety.org

It is okay to use the CSTC logo on your letterhead. But you must always

add "**Member of ...**" or "**Member since ...**" when using the logo.

When you change your e-mail address, telephone number, or your mailing address, **PLEASE** notify both the chapter and the society office, **and the current Newsletter editor** at cstcglb@gmail.com.

New updates for TheTaxBook . . .

New updates for TheTaxBook can be retrieved by going to the website: www.thetaxbook.com/updates.asp

Did YOU Know???

CSTC GLB chapter members were afforded the opportunity to participate in 18 hours of quality continuing education by attending the 2010 Sunday Morning Roundtable sessions. Topics included everything from federal tax issues and California non-conformity issues, to Software concerns and currently pending legislation. So I ask,

"Did YOU Know"

A California return filed with a balance due will go immediately to collections, where the FTB will assess a collection fee and will assess a filing enforcement fee. If that return is later amended with the prior balance due negated, neither the collection fee nor the filing enforcement fee will be refunded. These are "fees" not penalties, and they are not abateable.

"Did YOU Know"

As of mid-March 2010, Schedule M was calculating incorrectly for certain taxpayers. The IRS computer was not recognizing certain earned income listed on line 1b, and was calculating the amount of the credit based solely upon line 1a. Taxpayer's may have received a CP12 from the IRS indicating there was an error on the return as originally filed AND disallowing some or ALL of the credit. A simple telephone call to disagree with the change will correct the IRS error.

"Did YOU Know"

Once an individual has established residency in the State of California, residency does not terminate until such time as the individual severs all ties to California. Simply moving out of the state may not sever the ties in the eyes of the FTB – if the taxpayer still owns property in California (including a former personal residence) a California tax return may still be required to be filed.

“Did YOU Know”

You have been invited to follow Lynn Freer's Twitter where she provides the edgier side of California tax, as well as up-to-the-minute news and changes. Go to MsCAtax and follow Ms. California!

As a member of CSTC Greater Long Beach chapter I enjoy our Roundtable series presented each year. I eagerly await next January when the series will begin again. In the meantime, I look forward to some interesting topics to be presented at our evening educational meetings.

Aloha & Mahalo – Jen, your Editor

What do you think?

As we move into Spring, no doubt many of you will be taking a long look at how well your business fared financially during the busiest time of the year – January through April. Likely, we will all be looking for ways to not only increase our income next season, but also for ways to reduce our expenses moving forward.

As a networking group, one of our goals should be not only to provide sound tax advice to our clientele, but also to provide sound business advice to each other. Sharing ideas through our newsletter is just one way to support your peers in the CSTC Greater Long Beach Chapter.

This Month's Question:

What will your primary focus be for the 2010 Tax Season as a means to reduce business overhead in your tax practice?

Please take a moment to consider this month's question, then eMail a

brief response to be posted in next month's newsletter.

*Responses should be **limited** to no more than **300 words** so that everyone may have a chance to participate.*

eMail to: cstcglb@gmail.com

Aloha & Mahalo – Jen, your Editor

Classified Ads:

Need Mentors: For **CSUF** Entrepreneurial Accounting during the Spring and Fall Semesters. Inquire: entrepreneurship@fullerton.edu or contact Andrea Hurt or Marisa Sherb at (657) 278-3464.

Chief Actuary: Robert R. Mitchell, EA, COPA: NRS (National Retirement Services, Inc.) Telephone: 714/622-3188 Email: robert.mitchell@NRServices.com;

So-Cal Quality Appraisals: Steven A. Hassoldt, Certified Residential Appraiser Telephone: (310) 371-5978 Email: socalquality@gmail.com

Bookkeeping: your place or ours. All shoe boxes are welcome. We also offer Quick Books training. Long Beach Business Services, Inc. Call Donna Miller at 562/424-3088.

TaxResources, Inc. is always looking for tax professionals for the tax season! Positions are available at our Orange County and Sacramento locations. Enjoy flexible hours and great pay. To find out more about our company and our job opportunities, and to apply online, please visit our website at <http://jobs.taxaudit.com>.

Greeting Cards: *HAVE YOU FORGOTTEN TO SEND A CARD TO SOMEONE YOU CARE ABOUT?* Best client follow-up system – “Sendoutcards”. For information contact: Butch Kaske at 626/297-2114

Tax Preparation Support: Part-time or ‘as needed’ tax preparation support.

Call Jean Miller at 310/809-9984

Real Estate Services: An Agent/Broker since 1972. I will pay a \$500 Finders Fee to any CSTC member who refers me someone who wants to buy or sell, no matter the location! Through my CRS Directory, I have every state and MOST cities covered by well qualified, experienced CRS holders! **(The CRS designation is held by less than 5% of ALL RE agents!)** R.I."Butch" Kaske, CFP, CRS, DTM Home: (760) 931-2644 Cell: (626) 297-2114

Share Office Space Seal Beach: Looking for an individual to share an office location with me in the Seal Beach area. Interested parties should call: Carol Lalli 562/594-4834

The editor apologizes if I missed any advertisements in this issue – it was put together quickly during tax season. See you April 28!!

ADVERTISE WITH CSTC GLB!!!

If you are hiring, or perhaps need extra employees for the tax season;

*If you are selling furniture or supplies;
If you are interested in promoting your business specialty;
Or, if you just have something you would like to say to your peers...*

Consider placing an ad in our monthly newsletter. It's a great way to get your message out to a targeted audience that will best meet your needs!

eMail your request to the editor at: cstcglb@gmail.com.

This service is free to CSTC Greater Long Beach Chapter members.

If you know of a business or someone that could benefit by placing an ad in our newsletter, please have them contact Dennis Kaho, 562/421-8523. Non-CSTC members are welcome to submit their ads for a monthly fee of \$10.00.