



California Society of Tax Consultants

# CSTC Greater Long Beach Chapter Newsletter

## SOCIETY CORPORATE OFFICE

### California Society of Tax Consultants

12419 Lewis Street, Suite 106

Garden Grove, CA 92840

Phone: 714/750-2782

Fax: 714/750-2722

[www.cstcsociety.org](http://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 Are held at:

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 Members no RSVP

\$40.00 Guests

**Meeting:** 8:45 to 12:00 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:** 6:00 to 9:15 P. M.

April thru November 2 hours CE/ea

### Board Meeting: 4:30 to 5:45 P.M.

April thru November

Officers, Directors, Board Volunteers

*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*

Be Sure To Look on Page 4 under:

## BOOK ORDERS

See if you have already qualified for a free copy of The Tax Book 2010; or if you have not, look to see how many more meetings you must attend to qualify!!!!

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.

### Upcoming Meetings and Events:

August changed to the -3<sup>rd</sup>-Wed  
**NOTE AUGUST DATE CHANGE BELOW**  
**08/18/10:** Lynn Freer  
CA Tax Issues

1000-CE-3113  
2 Hours State

## INSIDE THIS ISSUE:

- Upcoming Meetings/ Events: Dates & Menus
- President's Corner
- Society News & Events
- Members Corner
- Society Calendar
- Chapter News
- Tax News
- Notes from Nikki
- Publications of Interest
- Other Chapters' News
- Did YOU Know???
- What Do You Think?
- Classified Ads

Continued:

Upcoming Meetings and Events:

- 09/29/10: David DuVal on Ethics
- 10/27/10: Practice Management, Roundtable Discussion
- 11/17/10: Keith Kershner, of the IRS: IRS Hot Topics; also, elections
- 12/15/10: Holiday Party, Installation of new Officers & Board Members

Menus:

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

1<sup>st</sup> VICE PRESIDENT:

John Murrill, 562/981-2900 [tigerjohn@earthlink.net](mailto:tigerjohn@earthlink.net)

2<sup>nd</sup> VICE PRESIDENT:

Nancy Spiegel, 714/527-3065 [nspiegel@pacbell.net](mailto:nspiegel@pacbell.net)

TREASURER:

Barbara Cleary, 562/423-4533 [taxmarx@yahoo.com](mailto:taxmarx@yahoo.com)

SECRETARY:

Donna Miller, 562/424-3088 [dmillerea@aol.com](mailto:dmillerea@aol.com)

PAST PRESIDENT:

Hal LeMaster, 714/750-1796 [lemaster@pacbell.net](mailto:lemaster@pacbell.net)

DIRECTORS:

Stephen Bruce, 562/594-4830 [brucetax@gmail.com](mailto:brucetax@gmail.com)

Marie Chambers, 323/585-9927 [mariechamberstax@sbcglobal.net](mailto:mariechamberstax@sbcglobal.net)

Tim Cleary, 562/423-4533 [mrtim@dslextrême.com](mailto:mrtim@dslextrême.com)

Jen Horton, 310/415-1685 [jen@jenhorton.com](mailto:jen@jenhorton.com)

David McClenon, 562/926-2817 [Dwm\\_42@hotmail.com](mailto:Dwm_42@hotmail.com)

Jim Moriarty, 562/943-0149 [Jim.jr4@verizon.net](mailto:Jim.jr4@verizon.net)

Fran Oatridge, 310/530-6499 [franoatridge@hotmail.com](mailto:franoatridge@hotmail.com)

VOLUNTEERS:

Shirley Blanton, 562/433-3420

NEW PHONE NUMBER JULY 2010

David Eastis, 562/691-4008 [daeastis@aol.com](mailto:daeastis@aol.com)

Diane Kucera, 623/266-3332 [taxbus@dianekucera.com](mailto:taxbus@dianekucera.com)

Carol Lalli

Nikki LeBrun, 310/534-3492 [nlebrun@sbcglobal.net](mailto:nlebrun@sbcglobal.net)

Bob Mitchell, 714/622-3188 x 271 [bob.mitchell@nrservices.com](mailto:bob.mitchell@nrservices.com)

\*\*\*\*\*

**Congratulations !!!**

**Nancy Kindness**

**“Wear Your Name Badge”  
June 2010 Winner was  
Nancy Kindness**

Nancy will receive half-off the price of the next attendance to one of CSTC GLB’s Evening Educational Meetings.

Come to this month’s Evening Meeting – and don’t forget YOUR name badge!

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

**YOU may be the next winner!**

\*\*\*\*\*

**President’s Corner . . .**

Off to summer camp with the Boy Scouts. Hiking, swimming, horseback riding, campfire skits and stories. This month the Greater Long Beach Chapter will be offering California CE credits on August 18th, which is one week earlier than our "usual" meeting time. See you there.

*Dennis Kaho*

\*\*\*\*\*

**Treasurer**

Tax News – August 2010

This from Practitioners’ Liaison Sharon Sanders...

IRS Form 8109, which is used to deposit payroll liabilities at taxpayer’s bank and to pay estimates for federal Corporate tax liabilities will be phased out per the IRS press release “Treasury Goes Green, Saves Green” issued April 19, 2010. Starting in 2011 businesses that have a deposit requirement will be required to pay electronically using the Electronic Federal Tax Payment System, EFTPS.

The only exception to not using the EFTPS would be if a payroll tax liability is less than \$2,500, allowing the business owner to submit the payment with the tax return.

As part of this plan, the Treasury began implementing an initiative to require individuals receiving Social Security, Supplemental Social Security, Veterans, Railroad Retirement and Office of Personnel Management benefits to receive payments electronically. Individuals will be able to receive benefits either through direct deposit into a bank account or Treasury’s Direct Express

debit card. The requirement will apply to new enrollees beginning on March 1, 2011 and to existing check recipients beginning on March 1, 2013.

The Administration is strengthening protections for individuals who receive Direct Deposit. Treasury and the federal agencies that issue benefit payments have published a notice of proposed rulemaking to ensure that exempt federal benefit payments are protected from garnishment after they are directly deposited into accounts.

*Barbara Cleary*

\*\*\*\*\*

#### Membership Corner . . .

*Stephen Bruce  
The Membership Guy*

*Remember... wherever you go, there you are!*

\*\*\*\*\*

#### The Birthday Corner:

#### August

#### Happy Birthday To:

**Thomas H. Perkins**

**Jean C. Miller**

**James R. Hicklin**

**Helen Vargas**

**Director Marie Chambers**

**James W. Schoellerman**

**Jose Penna**

**Joseph L. Wilson**

**Jiten Doshi**

**Jeannie Ann Hambric**

**Luis Ramon Barreras**

I know our membership will be continually growing and I'll be asking the new people for their birthdates. Thank you for your cooperation. If you haven't already done so, please contact Hal LeMaster @ 714-750-1796 to complete the list and/or to make corrections for future newsletters.

*Hal LeMaster*

\*\*\*\*\*

#### Special Message regarding the 2009 Making Work Pay Credit

I received a notice from the IRS under a valid, executed POA on behalf of a taxpayer in the armed forces with low W2 Box 1 earnings and high Box 14 Code Q earnings - taxpayer was deployed and received combat pay during most of 2009. The IRS "computer system" reduced the amount of Making Work Pay credit, citing an incorrect computation on Schedule M.

In March of 2010 I spoke to the IRS about this same issue with another client; the agent told me The Service was aware of the problem and was working to correct it. The IRS "computer system" is NOT considering the Box 14 Code Q combat pay when calculating the Making Work Pay credit. It is now obvious to me The Service did NOT correct the matter, and it is costing OUR CLIENTS money in the form of credit reduction. Suffice, a simple phone call will correct this IRS error - though it is a phone call we, as practitioners, should not be required to make.

[If you prepare a tax return for a member of the armed forces whose W2 has Box 1 earnings below the amount required for the maximum Making Work Pay credit AND you do not hold a valid and executed Power of Attorney for the individual, make certain the taxpayer understands to contact you WHEN --- not IF -- WHEN they receive the letter from the IRS which reduces their Making Work Pay credit.](#)

Keep in mind that many soldiers in deployable units likely to receive non-taxable combat pay spend alternating periods deployed (12 months stateside and 12 months deployed), **AND** if the Making Work Pay credit returns for tax year 2010, I have NO reason to believe this particular situation will change - it will simply affect different clients, clients with low W2 Box 1 earnings and high Box 14 Q earnings. It is up to practitioners to make certain the IRS does not erroneously reduce these credits for

the men and women serving their country in this most profound way.

*Respectfully Submitted – Your Editor  
Jen Horton, EA*

\*\*\*\*\*

#### Notes from Nikki . . .

#### Society Calendar. . . .

#### Support Society Education Programs!!!

8/24-26/10 IRS Tax Forum  
Las Vegas

8/31-9/2/10 IRS Tax Forum  
San Diego

9/09/10 CSTC Fundamentals /  
Refresher Classes  
South Coast College

9/20/10 Society BOD meeting  
Orange

11/15/10 Society BOD meeting  
Orange

12/2-12/3/10 Tax Bridge to 2011  
Anaheim Plaza Hotel

06/05-06/08/11 25<sup>th</sup> Summer  
Tax Symposium  
Las Vegas, NV  
The Orleans Hotel

6/9/11 Leadership Workshop  
at The Orleans Hotel  
in Las Vegas

#### Society News . . .

The Society Board of Directors meeting was held in Orange on July 19<sup>th</sup>. It was brought to the attention of the BOD that there was no candidate with the required majority (that Bylaw change was on the same ballot) for the position of 2<sup>nd</sup> VP. As directed by our attorney and the P & P's, Shari Hardy had the most votes and she was appointed to the position by President Nikki LeBrun, which was ratified by the BOD. Congratulations Shari Hardy!!

The Executive Committee addressed the concerns of the East County Chapter that had been submitted to them. North County had their name change approved to North San Diego

County Chapter. The Website committee submitted several proposals for consideration to implement the new website.

A CTEC report was issued for their 3 day meeting held in May. CTEC will conform to the new IRS education requirements 1/1/2011 so CRTP's will only have to take one set of federal hours to meet both IRS & CTEC requirements. State hours will still be required. They will also review the new Circular 230 to determine what changes CTEC will need to make with their policies. CTEC is also upgrading their registration process that should be completed in August. They are also looking at standardized testing for all providers.

It's time for update and basic tax classes. The 60 hour Fundamentals contact class (\$299) and the 20 hour refresher class (\$249) will begin on Mondays & Thursdays, September 9<sup>th</sup> from 6 PM to 9 PM at the South Coast College, 2011 W. Chapman Ave in Orange. The 60 hour Fundamentals is also available as a Correspondence Course. Contact the office for further information at 714-750-2782. Additional On-Line courses should also be available starting in September.

The Tax Bridge to 2011 will be held December 2<sup>nd</sup> & 3<sup>rd</sup> at the Anaheim Plaza Hotel. The brochures should be available on the website shortly for additional information. The 25<sup>th</sup> annual Summer Tax Symposium will be held June 5<sup>th</sup> to 8<sup>th</sup>, 2011 at The Orleans Hotel in Las Vegas with a "50's Sock Hop" type theme presented by the speakers at the Sunday Night Social. Please send your suggestions and ideas to Nikki LeBrun.

Time has almost run out to renew your dues for \$130. If you haven't renewed by August 15<sup>th</sup>, your membership will be suspended as well as all of your benefits, including voting. It will cost you \$145 to renew after August 15<sup>th</sup>. Don't forget what your membership includes: Reduced pricing for all education events & resource books; the Yellow pages & Software Users in the Roster to help us get through tax season with tax questions and computer software issues; Networking; we are your

official contact for the CTEC Board; "Members Only" section on the website to ask tax questions; \$25 education certificates for bringing in new members; free advertising; potential business growth and more to come later this year!!! ***If you have already renewed, we "Thank You" and appreciate your loyalty and the strength you bring to 44 years of CSTC and our Chapters.*** If you have not renewed yet, please send it in now. Don't miss out on what CSTC brings to you!!!

The next Society Board of Directors meeting will be held on Monday, September 20<sup>th</sup> from 10 AM to 5 PM at 500 City Parkway, Suite 100 in Orange directly across the street from the Society office. Great news is on the horizon. At this meeting, the new South Orange Chapter now has enough signatures on their petition for a charter as a new chapter to be approved by the BOD!!!

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.

***Respectfully submitted,  
Nikki LeBrun, CSTC President***

## **BOOK ORDERS**

It's that time again to start thinking about the book orders. GLB Chapter members that attend 9 meetings between October 2009 and September 2010 are eligible to receive a regular "FREE" Tax Book 1040 or a discount (amount to still be determined by the BOD) price for their total order. The book order form will be in the August & September newsletters.

**Here are the members, as of July 28<sup>th</sup>, who have qualified or need 1-2 more meetings to qualify.**

**Qualified:** Shirley Blanton, Inge Boekenhauer, Stephen Bruce, Marie Chambers, Barbara Cleary, Tim Cleary, Emilia Gomez, Jim Hicklin, Jen Horton, Dennis Kaho, Nancy Kindness, Nicole LeBrun, Hal LeMaster, Jim Moriarty, John Murrill, Fran Oatridge, Syed Shuja, and Nancy Spiegel.

**Needs 1 more meeting:** Shobha Bajaj, Luis R. Barreras, Martha Gilmore, Tom Jenkins, Rimalda Medina and Alice Moriarty.

**Needs 2 more meetings:** Carol Lalli, Donna Miller and Helen Vargas.

***Respectfully submitted,  
Nikki LeBrun, CSTC President***

### **Chapter Calendar . . . . .**

**4:30 PM to 6:00 PM – Chapter Board of Directors Meetings** (Open to members)

### **6 PM – 9:15 PM**

Evening Education Meetings on 7/28/10; 8/25/10; **9/29/10** (please note the change in the date); 10/27/10; 11/17/10; and

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

\*\*\*\*\*

### **Secretary's Chapter News. . .**

In July the Greater Long Beach Chapter was treated to a lively continuing education event. Chapter member David Eastis gave us an update on Exempt Organizations (non profits). He provided us a great handout that I know I will use when I work on the non profit tax returns that I do in my practice. We also had a fun and informative audience participation exercise. We had a "survey" and discussion about various income and expense items and how they are treated on the Form 990. David helped make a difficult and confusing subject fun to learn about. Many thanks to him for taking time from his busy schedule! And CONGRATULATIONS David on your recent marriage to Ann Bricker. We wish you all the best.

Our August speaker is scheduled to be Lynn Freer. PLEASE NOTE that we had to move the date of our August meeting. Due to a conflict with the IRS Tax Forum in Las Vegas (Aug. 24 to Aug. 26) **we changed our evening educational meeting to Wednesday August 18.** Please make a note of this change in our schedule and plan to come on out for our August educational event. Lynn will be giving us all the latest about

California tax issues. I know you won't want to miss it!

If you aren't on the PERMANENT dinner list, please be sure to call Marie Chambers before Wednesday August 11 to let her know you will be attending the August 18 meeting. We want to respect our relationship with the Lakewood Country Club and honor their request for a firm head count for the monthly meetings.

If any of you have colleagues in the area that need the more continuing education credits for this fiscal year, now would be a great time to get on the phone and invite them to attend our upcoming meetings. We have Lynn Freer giving us two hours of education on California issues in August and we have David DuVal giving us two hours of education on ethics in September. Please do make an effort to let your colleagues in the surrounding area know. We welcome ALL tax preparers to our meetings whether they are CSTC members or not!

At the July evening meeting we had the usual name badge drawing for half-off your next meeting. Chapter member Nancy Kindness won half-off. Congratulations Nancy!

Your chapter board of directors is eager to hear from you. So, if you have any ideas for topics for speakers or want to volunteer to help please let us know.

I'm looking forward to seeing you at the next evening educational meeting.

*Donna Miller, Secretary*

\*\*\*\*\*

#### **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** to our roundtable discussion.

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:** 1<sup>st</sup> 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:** 1<sup>st</sup> 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:** 3<sup>rd</sup> 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:** 2<sup>nd</sup> 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](http://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](mailto:cstcglb@gmail.com).

#### **New updates for TheTaxBook . . .**

New updates for TheTaxBook can be retrieved by going to the website:

[www.thetaxbook.com/updates.asp](http://www.thetaxbook.com/updates.asp)

\*\*\*\*\*

#### **Did YOU Know???**

TIGTA's Forensic Science Laboratory recently received accreditation from The American Society of Crime Laboratory Directors - LAB. Laboratory accreditation is official recognition of operational competence through an outside

assessment of a laboratory's quality, administrative, and technical systems. Accreditation demonstrates TIGTA's commitment to improving the quality of laboratory services provided to the criminal justice system, as well as its adherence to the highest performance standards in providing independent, impartial and objective forensic services. For more on this, see... [TIGTA press release](#)

The August Meeting has been rescheduled for Wednesday the 18<sup>th</sup> due to a conflict with this year's IRS Forum date. Please mark your calendars accordingly. Our speaker for August is Lynn Freer – as you have all heard. Lynn will be discussing California issues, and the CPE credits will be CA credit.

The IRS has identified 35,353 Small Non-Profit Organizations in California alone who are at risk of losing their 501(c)(3) status. The IRS has generously extended the date for filing back tax returns for these organizations to October 15, 2010.

*Aloha & Mahalo – Jen, your Editor*

\*\*\*\*\*

#### What do you think?

#### **This Month's Question:**

***No doubt many of our members will be attending the IRS Tax Forum in Las Vegas or perhaps in San Diego later this month. If you are in attendance, please share with your peers your experiences both with the education, the vendors, and The Service's special events (such as Case Resolution.)***

*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 (a paragraph is generally about 100 words)*

eMail to: [cstcglb@gmail.com](mailto:cstcglb@gmail.com)

*Aloha & Mahalo – Jen, your Editor*

#### **Last Month We Asked:**

#### ***What is your most valuable tool for everyday researching of tax questions.***

Hands down, my most valuable tool for everyday research – the Internet.

I use [irs.gov](http://irs.gov) and [ftb.ca.gov](http://ftb.ca.gov) for the majority of my tax research. There's nothing like getting the information "straight from the horse's mouth."

Sometimes it is necessary to search deeper. Try keying "tax regulations" in the IRS SEARCH box, then select the top rated link appropriately titled, "Tax Code, Regulations and Official Guidance."

The U. S. Small Business Administration at [sba.gov](http://sba.gov) is a link which *may be given to clients* who want to learn more about their responsibility as a small business owner.

A sister link to [sba.gov](http://sba.gov) is [business.gov](http://business.gov). On this website you will find links to appropriate tax authorities in all 50 states, as well as information pertaining to worker's compensation, new hires, and workplace signage requirements. No doubt I will be using this site primarily with the California links... but it's nice to know the other 49 are there for me as well.

For California **practitioner** specific information, [spidell.com](http://spidell.com) is the source. Practitioners may post questions on a virtual bulletin board. Other practitioners have the opportunity to post an answer. To post on [spidell.com](http://spidell.com), you must register as a practitioner/member.

For more complex tax questions, I use [taxalmanac.org](http://taxalmanac.org). The website is rather complex and not as user-friendly as most, but the information can be invaluable. Again, you must register as a practitioner/member to post on this website.

So, I use primarily the Internet for my everyday research; when I do not find my answer, I fall back on my networking through organizations like CSTC. With over one thousand California tax preparers in our membership, it is likely we will find someone who has seen our tax situation before and can help us with

its resolution. And may I call your attention to the first 11 words of the CSTC Society Mission Statement:

***"To promote professionalism by providing quality educational events for tax professionals"***

*Aloha & Mahalo – Jen, your Editor*

\*\*\*\*\*

#### Member Updates

David Eastis has moved his office location to:

B & E Services, Inc.  
1280 W Lambert Rd, Ste E  
Brea CA 92821

David's new telephone number is:

562/691-4008

David's eMail will remain the same:

[daeastis@aol.com](mailto:daeastis@aol.com)

\*\*\*\*\*

#### Classified Ads:

**Need Mentors:** For CSUF Entrepreneurial Accounting during the Spring and Fall Semesters. Inquire: [entrepreneurship@fullerton.edu](mailto: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](mailto:robert.mitchell@NRServices.com);

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

**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

**Share Office Space Long Beach**  
Looking for an individual to share a 1<sup>st</sup> Floor office space in Long Beach  
Kent Huber 562/427-7951

**Looking To Purchase Tax Clients:**  
Looking to purchase 100 to 150 tax clients from anyone ready to retire or downsize. We are not looking for accounting clients. Inbody has been past president of the Association of Business and Tax Consultants, member of CSTC and has over 30 years experience. Wilson has 3 years experience and member of CSTC. Office has been in same location for last 21 years. Call to discuss 714/345-1882 Milton Inbody

\*\*\*\*\*

**IF YOU KNOW OF ANYBODY WHO IS NOT RECEIVING OUR NEWSLETTER, PLEASE HAVE THEM SEND AN EMAIL TO [CSTCGLB@GMAIL.COM](mailto:CSTCGLB@GMAIL.COM) AND REQUEST TO BE ADDED TO THE LIST. WE DON'T WANT ANYBODY TO BE LEFT OUT!**

**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](mailto: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.*