



CSTC Greater Long Beach Chapter Newsletter

Save this newsletter for important meeting dates
 there will be no newsletter sent during February or March

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

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.

Greater Long Beach 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:
 \$35.00 Members with reservation
 \$40.00 Guest/Non-Members w/reservation
\$45.00 At the door, no reservation
Meeting: 8:45 to 12 Noon
 January thru April 3 hours CE/each

Evening Educational Meeting

Cost:
 \$35.00 Members with reservation
\$40.00 Non-Members or no reservation
Meeting: 6:30 to 9:15 P. M.
 April thru November 2 hours CE/each

*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.



Upcoming Meetings and Events:

- 01/13/10: TheTaxBook Workshop
- 01/24/10: Roundtable Discussion
- 02/07/10: Roundtable Discussion
- 02/21/10: Roundtable Discussion
- 03/07/10: Roundtable Discussion
- 03/21/10: Roundtable Discussion
- 04/11/10: Roundtable Discussion
- 04/28/10: TBA
- 05/26/10: TBA
- 06/30/10: TBA
- 07/28/10: TBA
- 08/25/10: TBA
- 09/29/10: TBA
- 10/27/10: Practice Management, Roundtable Discussion
- 11/17/10: TBA
- 12/15/10: Holiday Party, Installation of new Officers & Board Members

INSIDE THIS ISSUE:

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Menus:

01/24/10: Scrambled Eggs, Sausage, Breakfast Potatoes, Fruit, Breads & Pastries

02/07/10: Scrambled Eggs, Bacon, Breakfast Potatoes, Fruit, Breads & Pastries

02/21/10: Mini Omelets, Ham, Breakfast Potatoes, Fruit, Breads & Pastries

03/07/10: Breakfast Burritos, Sausage, Fruit, Breads & Pastries

03/21/10: Scrambled Eggs, Sausage, Breakfast Potatoes, Fruit, Breads & Pastries

04/11/10: Mini Omelets, Bacon, Breakfast Potatoes, Fruit, Breads & Pastries

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

1st VICE PRESIDENT:

John Murrill, 562/981-2900
tigerjohn@earthlink.net

2nd VICE PRESIDENT:

Nancy Spiegel, 714/527-3065
nspiegel@pacbell.net

TREASURER:

Barbara Cleary, 562/423-4533
taxmarx@yahoo.com

SECRETARY:

Donna Miller, 562/424-3088
dmillerea@aol.com

PAST PRESIDENT:

Hal LeMaster, 714/750-1796
lemaster@pacbell.net

DIRECTORS:

Stephen Bruce; Marie Chambers; Tim Cleary; Jen Horton; David McClenon; Jim Moriarty; Fran Oatridge

VOLUNTEERS:

Shirley Blanton, David Eastis, Diane Kucera, Carol Lalli, Nikki LeBrun, Bob Mitchell.

President's Corner . . .

((Please see the CSTC GLB Chapter 2010 Calendar of Events attached))

*Respectfully submitted by
Dennis Kaho, President, Greater Long Beach Chapter, CSTC*

Society News . . .

No meeting to report this month.

Membership Corner . . .**"MEMBERSHIP"**

Membership, schmembership; what does it really mean? I'll tell you, I don't know! So, I decided to open my trusty Webster's and here is what it said: "The state of being a member,...the total number of members in a group". Wow, that helped a lot! Okay, let's see what Webster has to say about the word "Member"; "A distinct part of a whole,...one who belongs to a group...". Now that's more like it. Kinda sounds like us, the Greater Long Beach Chapter which is a

member of the group known as CSTC.

There must be a lesson here. What did I get out of this dictionary exploration? I'll tell you, I know. Each one of us is a small yet important part of a larger unit or group. Without us, the group cannot function and may cease to exist. Just a little bit of participation and loyalty from each one of us keeps the group healthy and a healthy group can serve each member, such as you and me. Sounds good to me, let's go to press and continue to celebrate the Christmas Holiday.

Oh yeah, Beverly and Barbara from our Society office and yours truly had a great lunch the other day at Seafood Hokaido Restaurant in Long Beach. They responded to my "Membership Ideas" column a few months ago in our newsletter so they were the winners.

*Respectfully submitted by
The Membership Guy
Steve Bruce*

Happy Birthdays to:**January:**

Howard Erman, L.C. Green Jr., Harold LeMaster *Past-President*, and *new member* Eric Vanpraag

February:

Rumalda Medina, Remy Oliva, Minoo Behboody, Janie Williams, Sherry Board, and *new member* Irma A. Santos

March:

Nathan Schori (*our foreign tax specialist*), Eleonora Tsekoura, David McClenon, Bruce Campbell, Robert J. Dutil, Richard Thompson, George Hamlett, Gary Cole, Earl Wintz, Richard Koutsky, Marie Koutsky, and *new member* Ronzella Varnado

April:

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

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.

*Submitted by
Hal Lemaster*

Chapter News . . .

Happy Holidays to everyone. I hope you are all settling in to the new year. I'm sure you are getting all those preparations done for the coming tax season. We held the annual Holiday party on December 16th. Mr. David Gorgie provided some lively entertainment for us. He is a local comedian/impersonator/singer and helped us bid farewell to 2009. Around 30 members and guests attended the meeting. We had the usual White Elephant gift exchange which was also quite entertaining. Many thanks to all who came out to help celebrate and to those board members and volunteers who help make it all "happen."

We installed the newly elected board members at the meeting on the 16th. Your new board is already busy putting together the plans for the new year's education events. Congratulations to all the new board members. The board is eager to hear from you. Especially if you have some input about speakers and topics for 2010. Please make your wishes known to the board. And many thanks to ALL the board members who have served you this past year.

At the Holiday party we collected money for the LA Regional Food Bank. Your chapter will match all donations up to \$300. Thanks to all who help make this fund raiser a success.

Elsewhere in this newsletter you should note the schedule of upcoming Morning Educational Events (six meetings scheduled in January, February, March, and April) and the schedule of Evening Educational Events for the remainder of the year.

Please get out your 2010 calendars and mark them now. We don't want you to miss all the fun and education coming up.

Don't forget that you can pick up your Tax Books at the first Morning Meeting on January 24. Or, if you are attending the Tax Book Workshop on January 13 you will receive your books then. If you can't make it to either of those meetings please contact Fran Oatridge to make arrangements to pick up your books.

I would like to wish you all a Happy New Year and a prosperous tax season in 2010.

*See you at the next meeting.
Donna Miller*

Tax News . . .

In my mailbox today from Maria Jaramillo, IRS Senior Stakeholder Liaison:

During the 2010 tax filing season, the IRS will step up its efforts to ensure paid tax return preparers are assisting clients appropriately. Starting this week, the tax agency is sending out letters to tax return preparers nationwide. These preparers are among those with large volumes of specific tax returns where the IRS typically sees frequent errors. Specifically, the letters will encourage return preparers to:

- Review pertinent books and records of Schedule C filers.
- Determine the correct itemized deductions of Schedule A filers.
- Make sure those who claim dependents and the EITC are entitled to do so.
- Ask first-time homebuyers the right questions to make sure they qualify for the First Time Homebuyer Credit.

The letters will also remind tax return preparers of the consequences of filing incorrect returns. This includes monetary penalties, suspension or expulsion from participation in IRS e-file, civil injunctions barring the return

preparer from preparing tax returns and referral for criminal investigation.

During the filing season, IRS representatives will visit thousands of tax return preparers who received these letters to discuss many of the issues described. This is part of a broader effort by the IRS to step up its efforts to ensure paid tax return preparers are assisting taxpayers appropriately. Separately, the IRS will be conducting other compliance and education visits with return preparers on a variety of issues.

In addition, the IRS will more widely use investigative tools during this filing season aimed at determining tax return preparer non-compliance.

One of those tools will include visits to return preparers by IRS agents posing as a taxpayer.

Barbara Cleary

Notes from Nikki . . .

Happy Holidays to our CSTC Membership

Happy New Year!!

CSTC and Chapter elections have passed and the new Boards have been sworn in to take us through 2010.

A new tax season is starting and another year of uncertainty with the tax codes is upon us, again. Unfortunately, our elected officials have not done their job and we are left with uncertainty with Estate taxes and many items that should have been extended for 2010 if they were paying attention!!! We will be left accountable to keep tabs on legislation that is issued while we are trying to do the 2009 tax returns for our clients.

It will be very important for us to attend our Morning Education meetings on alternating Sunday's to keep up with everything that may be changing in the tax code as Congress is very likely to process the extenders and make them retro-active. We certainly will want to keep our clients abreast of any changes as they sit in

front of us pondering what to do for 2010.

The biggest unknown is the 706 Estate taxes and we'll be depending on Hal & Shirley to let us know if there are changes for 2010. As it stands now, there is no 706 Estate tax due for those passing away in 2010. While you may think that is great – here's the kicker – there is NO STEP UP IN BASIS!! Instead, we will be using the deceased basis rather than FMV's.

I would suggest we continue to advise our clients to get property appraisals and DOD values on stocks, bonds and other financial investments as Congress will not be able to leave this as a zero tax year and it will save us time in the long run. I suspect the extension rates this year will be very high for all tax return types as bankruptcies and foreclosures continue to increase.

It's going to be another l-o-n-g tax season for 2010. Please utilize your "Yellow Pages" in our Rosters to help you with those pesky questions from your clients and the uncertainty of what will remain in the "temporary" tax code we've been using since 2001.

Take advantage of your membership and attend every education program that is offered in 2010 by Society and our Chapters. Watch the "Education Calendar" on our website for topic updates that suit your needs. Remember, a member of CSTC is given member pricing at any CSTC education program whether it is Society or ANY Chapter sponsored meeting, if you have made a reservation.

I wish you all a healthy and prosperous new tax season!!!

Warmest Regards,
Nikki LeBrun, EA
CSTC President

Society Calendar...

Support Society Education Programs!!!

1/14/10 Society Board Meeting – Location TBA

1/22/10 **Year End Reporting DUE for Society**

5/7 & 5/8/10 Tentative 2-day Society BOD meeting – TBA

6/6-6/9/10 Summer Symposium @ Silver Legacy, Reno Nevada

6/10/10 Leadership Workshop @ Silver Legacy, Reno Nevada

Society News . . .

The next Society Board of Directors meeting will be held on Thursday, January 14, 2010 at 500 City Parkway, Suite 100, in Orange, from 10 AM to 5 PM.

CSTC's annual meeting was held on Thursday, December 3rd at the Anaheim Plaza Hotel during the luncheon. The results of the annual election and ballot measures were announced by Hal LeMaster. For 1st VP, **Linda Morlang** (OR) retains her position and for 2nd VP, **Shari Hardy** (IE) also retains her position. The Society Executive Board remains the same for 2010. We thank **Cindy Price** (EC) & **Juanita Aguilar** (SFB) for running and wish them well in their future endeavors with CSTC.

As for the ballot measures, the first one for the revisions to the Bylaws passed overwhelmingly. The second and third measures regarding the dues splits failed. I want to thank Hal LeMaster and his committee for their time for counting the ballots.

I am very happy to announce that the "CSTC Member of the Year" award was given to **George Fahkouri** of Central Valley. I have worked with and under George's leadership for the last 10 years and I can attest that this award is long overdue and well deserved for all his many contributions to CSTC – Congratulations George!!! The annual "Increase in Membership" awards were presented. The first place trophy went to **Temecula Valley Chapter**, second place to **South Bay San Diego Chapter** and

third place was given to **East County San Diego Chapter**.

Congratulations to those chapters who worked very hard to bring up their membership last year!!! GLB members – you have your work cut out for you this year to re-claim that first place trophy!!

Rose Carter (SD) resigned her position as our CTEC Rep in November. **Karen DeVaney** (CV) graciously accepted the position to represent us. There was a 3 day meeting in November and Karen brought back the following information for us.

Starting in 2010 the CE requirements will now include 2 hours of annual Ethics, 12 hours of Federal, 4 hours of CA and 2 hours of Federal or CA credits. There has been much discussion and confusion about renewal registrations changing. Starting October 31, 2012 if a preparer is late in applying for their renewal, a late fee of \$55 will be charged until January 15, 2013. After that date you will have to start all over by completing the 60 hour basic course again before you can register with CTEC and before you can prepare tax returns again. We will have to wait and see what else CTEC will do once the new IRS Tax Preparer Registration begins.

As I write this to you, IRS has just released their proposals in IR-2010-1 that they are starting to implement to regulate all tax preparers.

Briefly, here is a summary of what is coming and letters are starting to go out now. All paid tax preparers who sign tax returns will be required to register with IRS and obtain a preparer tax identification number (PTIN).

There will be a compliance check to be sure you are current with your own personal, employment and business tax returns and that any tax due has been paid. Competency testing will be required of all paid tax return preparers **EXCEPT** attorneys, CPA's and EA's who are active and in good standing with their respective licensing agencies.

A minimum of 15 hours of annual professional CE will be required for all preparers **except** attorneys, CPA's and EA's that are already subject to higher CE requirements. The ethics rules in Circular 230 will be extended to all paid preparers. This will allow IRS to suspend or discipline tax preparers who engage in unethical or disreputable conduct.

There are many other provisions in the IRS memo that you can read for yourself on the website (it's 57 pages), but there is one more that I will mention now. Beginning this week, IRS will be sending about 10,000 letters to preparers nationwide that typically have errors in the returns they process. Thousands of those that receive the letters will also be visited by IRS Revenue Agents, so be prepared. I don't expect to hear that anyone in CSTC gets a letter or a visit from IRS because of the high standards that our members already practice.

Now is the time for my "plug" for the 2010 Annual Summer Tax Symposium at the Silver Legacy Hotel in Reno, NV from 6/6 to 6/9/10. By the time you get the newsletter, you should have received your brochures. If not, check the CSTC website. Remember, the first cut-off is March 15th and GLB members have a special incentive from our chapter if they have signed up by that date!!

All year end reporting from the Chapters must be turned into the Society Office no later than Friday, January 22, 2010.

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.

Chapter Calendar . . .

Chapter Calendar

1/13/09 8 AM – 5 PM The Tax Book Seminar

1/24/10 8:45 AM – 12 PM 1st Round Table Breakfast Meeting (**Books distributed**)

8:45 AM – 12 PM 2/7/10; 2/21/10; 3/7/10; 3/21/10; 4/11/10 Round Table Breakfast 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 Evening Education Meetings and 12/15/10 Christmas Party & Installation of new Officers

Chapter Elections

Our chapter elections were held at the November meeting by written ballot and our new Officers and Directors were sworn in at our December 16th Christmas Party and will take office on January 1, 2010.

The following have been elected for the GLB 2010 Chapter Board: 1st VP - John Murrill; 2nd VP - Nancy Spiegel; Secretary – Donna Miller; Directors: Stephen Bruce; Marie Chambers; Tim Cleary; Jen Horton; David McClenon; Jim Moriarty and Fran Oatridge. The following still have time remaining to serve in their terms: President, Dennis Kaho & Treasurer, Barbara Marx Cleary. Our current Past President, Hal LeMaster also remains on the Board. Chapter Volunteers are Shirley Blanton, David Eastis, Diane Kucera, Carol Lalli, Nikki LeBrun & Bob Mitchell.

Christmas Party

The Christmas party was on December 16th and if you missed it, you missed a great time!! We had a really good turn out this year and the food was very good. We had entertainment provided by David Gorgie who gave some interesting singing impressions and turned several ladies "red" with blush with his antics.

We had a special "surprise" visit from long time member **Diane Kucera** who is living in AZ but is still a member of our chapter. We had several visitors including our future youngest tax preparer, Abigail (Abby) Moeller who was accompanied by her Mom Briana. Little Abby just "rocked" the night away with all the music. Also in attendance was **Sarah Lawrence**, our late President Scott Lawrence's

wife, who expressed her thanks to all the GLB volunteers who helped her and Briana last year keep their family business up and running.

We also had several spouses and significant others there. Hal LeMaster announced that he will be a "grandfather" this year.

I know we **reached our charity goal of at least \$300** which our chapter is matching, but I don't know exactly how much was collected as our Treasurer, Barbara Marx Cleary has those numbers, which I think is somewhere between \$700 to \$800. I received a personal "Thank You" letter from the LA Regional Food Bank for CSTC's fundraising efforts to help those less fortunate and how grateful they are that we selected their organization again this year as our charity to sponsor. I also say "Thank You" to everyone who contributed to this wonderful organization that helps our community – you did a very fine thing with your donations!!!

Our annual "White Elephant" exchange was one of the best we've had in recent years, as a lot of "stealing" went on but a good time was had by all!!! I had a fabulous time and I hope you did too. I also want to say "Thank You" to my assistant "elf", **Shirley Blanton**, for taking care of all our table gifts and the other gifts we gave out as I was juggling another family medical crisis and needed some help again this year.

Anniversaries

37 years ago on October 18, 1972 San Gabriel River Chapter, now known as the Greater Long Beach Chapter, received their charter from ISTC, now known as CSTC. We thought it would be nice to wish a "Happy Anniversary" to our ALL of our chapter members as we ring out 2009 and bring in 2010!!

We want to say "Thank You" to all our members who continue to support our chapter and CSTC. As "We Care Enough To Share", let's continue our joint efforts to reach our goal of "2012 by 2012" in our membership!! I hope I didn't forget anyone and I apologize

if I missed someone with the list I was given.

Not Quite A Year – New Members:

Almendarez Ryder, Thelma
Carreon, Valencia
Correa-Carrillo, Rebecca
Cotton, Kevin
Ghaly, John
Jimeno, Sr., Porfirio
Rivera, Lillian
Roman, Denise
Sanchez, Mayte
Santiago, Lucy
Santos, Irma
Thompson, Traci
Urbanski, Dorothy
Vanpraag, Eric
Vanado, Ronzella
Zamorano, Rene

1 – 5 Years:

1/22/04 Bajaj, Shobha
8/20/08 Board, Sherry
5/15/07 Boekenhauer, Inge
5/1/06 Chambers, Marie
1/6/04 Eastis, David
9/29/04 Farfan, Frank
2/16/06 Gomez, Emilia
8/31/08 Green, L.C.
4/1/05 Hambric, Jeannie
2/1/06 Hicklin, James K.
5/18/05 Hollingworth, Krystyna
9/12/07 Horton, Jen
8/23/05 Jones, Robert
10/21/05 Joy, Kenneth
9/18/06 Kindness, Nancy
12/4/07 Lalli, Carol
5/16/05 McClenon, David
5/19/04 Miller, Donna
10/3/07 Miller, Jean
3/15/08 Moeller, Briana
2/8/06 Moriarty, James
5/1/05 Murrill, John
12/20/05 Oatridge, Fran
9/13/07 Oliva, Remy
12/1/05 Payne, Paul
10/7/04 Penna, Jose
6/27/06 Shuja, Syed
3/21/04 Shulman, Steven
1/4/05 Simon, John
3/22/04 Visitor, Charles
8/03/08 Wang, Hank
5/20/05 Whittaker, Joan
9/5/07 Wilson, Joseph

6 – 10 Years:

7/02/01 Barreras, Luis E.
10/24/01 Barreras, Luis R.
10/27/03 Bouie, David
3/1/02 Cleary, Tim
3/31/03 Figueroa, Luis
5/3/00 Gilmore, Martha
5/5/99 Hicklin, James R.

6/6/01 Kaho, Dennis
4/25/00 Marx-Cleary, Barbara
5/11/00 Medina, Rumalda
9/3/03 Schoellerman, James
3/18/03 Spiegel, Nancy
10/9/02 Tovar, Christopher

11 – 15 Years:

5/28/97 Bruce, Stephen
9/6/94 Campbell, Bruce
4/5/96 Huber, Kent
1/6/98 Jenkins, Thomas
2/18/96 Kucera, Diane
4/1/95 LeBrun, Nicole
2/8/96 Mitchell, Robert
2/23/97 Overfield, Sherrill
6/8/94 Williams, Janie

16 – 20 Years:

3/16/93 Behboody, Minoo
9/15/90 Cole, Gary
10/7/92 DiLiberto, Stan
10/30/91 Erman, Howard
11/18/92 LeMaster, Harold
1/7/89 Ramos, Antonia
1/27/93 Sinkovits, Diane

21 – 25 Years:

10/21/87 Doshi, Jiten
1/19/84 Eastis, Betty
3/20/88 Kaske, Regis
9/22/83 Kosharian, Harry
1/17/83 Koutsky, Marie
5/6/87 Koutsky, Richard
2/1/83 Moriarty, Alice
10/18/88 Ponso, Joyce
12/5/83 Thompson, Richard
3/12/88 Vargas, Helen
12/29/88 Wintz, Earl

26 – 30 Years:

11/5/82 Blanton, Shirley
1/8/82 Hamlett, George

31 – 35 Years:

8/5/77 Dutil, Robert
8/5/77 Shannon, Anna

– Nikki LeBrun

Greater Long Beach Chapter Benefits . . .

Discount pricing to all Chapter Educational events *with reservations*. Attend the roundtable **Morning Educational** meetings 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 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.

INLAND EMPIRE: 3rd Wednesday of the month. Call @ 888/853-9670 for information and reservations. Their meeting is held at the Double Tree Hotel Claremont, 555 W. Foothill Blvd., Claremont. 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 Elks Lodge, 212 S. Elk Lane, Santa Ana. 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 Newsletter editor**, Nancy Spiegel @ 714 527-3065.

New updates for TheTaxBook . . .

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

Did you know???

The following was taken from the IRS website.

"...Practitioners must comply with the FBAR filing rules. For example, failure to timely file required tax or information returns, including FBARs, must be disclosed on Form 8554, Application for Renewal of Enrollment to Practice Before the Internal Revenue Service."

"A practitioner must comply with FBAR rules as part of his or her due diligence obligation under Section 10.22 of Circular 230..."

For the entire article, please go to: <http://www.irs.gov/taxpros/agents/article/0,,id=100709,00.html>

Proposed legislation may bring ALL paid tax preparers under the umbrella of Circular 230, making this guideline applicable to everyone.

Please, please, please take extra care when addressing FBAR issues!

*Respectfully submitted by your editor
Jen Horton, EA*

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, EA, 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

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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

South Bay Event: I have tickets you may purchase to the 4th Annual **Adrienne's Search for Children's Cancer Cure**, to be held this year on Saturday, March 6th, 5:00 p.m., at the Hermosa Beach Kiwanis Hall. Tickets are \$30.00; children 12 and under free. Includes dinner, entertainment, Silent Auction, and children activities. Proceeds benefit **The Sunshine Kids**. If you or anyone you know are interested, call Jen Horton, EA, 310/415-1685 or find me at the Sunday roundtable event.

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

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