



California Society of Tax Consultants
(Formerly known as Inland Society of Tax Consultants, Inc.)

NORTH COUNTY CHAPTER

1721 Kurtz St.

Oceanside, CA 92054

“ADDRESS CORRECTION REQUESTED”

MEMBERSHIP IN THE CALIFORNIA SOCIETY OF TAX CONSULTANTS, INC. WILL... IMPROVE YOUR KNOWLEDGE, PROFICIENCY, STATURE AND INCOME”

EDUCATION

IMPROVE YOUR KNOWLEDGE with our Progressive, continuing Education Program, which includes seminars, workshops, monthly dinner meetings, basic 60 hrs. tax course, and tours of the IRS and FTB facilities.

STATE REGISTRATION

PROVIDES “FUNDAMENTALS OF INCOME TAX PREPARATION COURSE” to enable all participants to prepare Federal and California individual tax returns and to qualify for California required registration

MONTHLY CHAPTER MEETINGS

IMPROVE YOUR KNOWLEDGE, PROFICIENCY, STATURE AND INCOME by attending monthly chapter meetings. The benefit of regular attendance provides information, education, and social interaction with your fellow practitioners.

MEMBERSHIP ROSTER

IMPROVE YOUR PROFICIENCY by having access to CSTC’s Roster of Members which identifies each member and their chapter affiliation. A valuable resource in time of need!

IDEA EXCHANGE

IMPROVE YOUR PROFICIENCY AND INCOME by sharing ideas and problems with your fellow tax practitioners. Get to know your area colleagues at chapter meetings.

NEWSLETTER

IMPROVE YOUR EFFECTIVENESS by reading the CSTC newsletter, The Reporter, which will keep you informed about current activities and educational seminars and workshops.

LEGISLATION

IMPROVE YOUR STATURE by supporting the group voice of the Society which will be heard at the State and National levels of government. As a Society, we have greater impact on our legislators than we have as individuals.

LONG RANGE PLANS

We currently have 15 chapters located in the Inland Empire, Foothill, Modesto, Los Angeles, Orange County, Sacramento, High Desert County, San Diego East County, San Diego North County, San Diego South Bay, San Francisco, San Gabriel Valley, San Jose, and Temecula Valley. Become Part of this Growing Society.

CAN YOU AFFORD NOT TO BELONG?

Fill in the membership application and send it with your dues to:

12419 LEWIS ST., STE. 106 • GARDEN GROVE, CA 92840



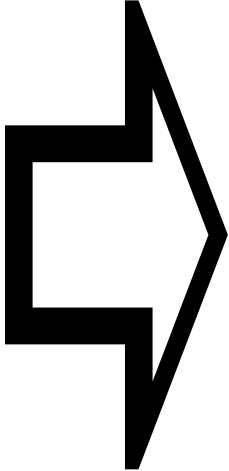
California Society of Tax Consultants

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 society.

Meeting - July 8th, 2010
Location: 1425 N. Twin Oaks Valley Rd., San Marcos, CA

Meeting, July 8,, 2010



5:00 Registration

5:30-6:30, Pledge of Allegiance, Greeting

First Session Rod Couts, No County member

Speaking on the effects of leasing for tax purposes

6:30-7:30 Social time and dinner set up

7:00-8:00 Dinner

8:00-9:00 Second Session, Rod Couts, continuing

YOUR ELECTED BOARD MEMBERS

President,	Linda Beckett (760) 631 8006
1st Vice Pres,	Kathy De Monte (760) 438 3870
2nd Vice Pres,	Mary Stewart-Giordano (760) 738 1595
Secretary	Sabrina Light (760) 429-8103
Treasurer	Agi Szabo (888) 833 7739
Past President	Joanne Schroeder (760) 740 0582
Directors:	Alexx Chesney, Karen Gleason, Cheryl Kerber, Phyllis Owens and Allison Beckett-Sepsey

RESERVATIONS

Make your reservations by email to abbtts@earthlink.net by July 5th for the July 8th meeting. Phone, 760 631 8006. Meal-Chef’s Choice, Fish or Vegetarian must be made at this time and any walk ins will not be guaranteed their choice. Price is \$28 for Members, and \$33 for members failing to make reservations, Non members will be \$46.

DISCLAIMER

This presentation has been designed to meet the requirements of the Director of Practice of the Internal Revenue Service; The California State Board of Accountancy; and the California Tax Education Council, Business and Professional code #22250-22259, include code 31 of Federal Regulations (10.69g), continuing education rule 88(c) - covering maintenance of attendance records, retention of program outlines, qualifications of instructors and length of class hours. This does not constitute an endorsement by these groups.

1040 EXCHANGE

Editor H. Marie Lindsey • 760-757-8480 • e-mail: tro_glin@yahoo.com

Message from the President



Linda Beckett
Past Chapter President
& State Society President

President's Message

Have you heard about the new Preparer Regulations? The 8th Objective of the California Society of Tax Consultants is "To monitor regulations of the tax professional in the interest of the profession and general public."

Not only has our Chapter been actively engaged in monitoring what is coming our way in regard to the new Federal Preparer Registration, your State Society Board has also been active in the discussions as well.

Long before the new procedures were drafted, your California Society of Tax Consultant's Board of Directors discussed and made recommendations on your behalf. It was the Society Board's opinion that Tax Professionals should be 'grandfathered' or 'exempt' from Federal regulation, because we already had a registration requirement.

However, the Federal Legislature decided that there would be no exceptions, and that Tax Preparers in states that already had registration processes in place would not be treated differently from those who did not.

In consideration of the Objectives of Society, I think that this was the most appropriate decision. To make exceptions would not have been in the interest of the general public. Although most of us only practice in California, there are many times we are preparing another state's return. And some of us prepare returns by mail for clients who reside in other states. By requiring all Tax Professionals to meet the same level of competency, the status of the Tax Professional will be lifted to a higher standard. Not only does this protect our interest as an industry, but it also protects the interest of the general public.

Although this new registration process may seem cumbersome and unnecessary to those of us who already maintain a higher standard of professionalism with continuing education and ethical practices as a Society member, it seems as though it is time to set some national standards as well.

So if you haven't heard about the new Preparer Regulations, come to our next meeting for an update from your California Society of Tax Consultants friends!

Linda Beckett

FALL WORKSHOPS

Plans are in the works for this series of seminars under the guidance of Cheryl Kerber and Phyllis Owens. Watch for announcements for the dates, subjects and speakers in the newsletter and e mails. This series was extremely successful last year and promises to be a repeat. The original dates announced may have one conflict and an additional, later date will be announced. Watch your notices!

CALENDAR FOR THE YEAR

<i>August 12</i> , Lisa Ihm's topic of "Tax Jeopardy"	<i>Aug 31</i> – Sept, 2, IRS FORUM in San Diego, access IRS website to register early, this is the best price for an excellent three day seminar	<i>Sept 9</i> , Lunn Freer, representative of Spidell will spend two hours on Calif. updates
<i>Sept 22</i> , the first of the Fall Workshops	<i>Sept. 25</i> , second session, Fall workshop	<i>Sept. 29</i> , third
<i>Oct. 2</i> , Last Fall workshop Phyllis Owen and Cheryl Kerber are hosting the Fall Workshops—more will be forthcoming for early registration as well as location and instructions	<i>Oct. 14</i> , Linda Beckett will speak on "Pratice Management and Ethics" And Nov. 11th, Jack Miller will present "Interesting Tidbits on Quickfinders" and Jackie Skay will speak on "Estates and Trusts".	<i>Nov. 11th</i> , Jack Miller will present "Interesting Tidbits on Quickfinders" and Jackie Skay will speak on "Estates and Trusts"
<i>December 9th</i> , Holdiay Meeting		

AND DON'T FORGET THE SOCIETY...

The Annual seminar hosted by the Society office will be held in Dec. as usual and flyers will soon be issued for this great education event.

AS WELL AS OUR OWN RUNNING START...

Plans are now being formulated for that annual San Diego County presentation, to be held in three different locations to accommodate the wide occupancy of Society members from San Diego County.

Happy 4th of July!



HOLIDAY MEETING

IT is not too early to think about the annual meeting, at which time is entirely social. Alexx Chesney has been named chairperson and she welcomes any and all suggestions about entertainment and activities.

