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SACRAMENTO CHAPTER – JULY 2008

Monthly Meetings are held on the Last Tuesday of the month May through January

MONTHLY MEETING JULY 29, 2008

SCOTT'S SEAFOOD GRILL & BAR, 545 Munroe St., Sacramento
(We may have to use another location of attendance is light –we'll call ALL who register!)

6:00 pm Dinner
7:00 pm Education Presentation

NEW SPEAKER NIGHT – COME SUPPORT THESE BRAVE SOULS! Better yet, BE one!

So far we have:

Joan McHugh, CPA – Registered Domestic Partners, or Audit Procedures
Teresa Brady, CTEC – Adoption Credits, or Introduction to Divorce Issues

Tell us which of these you prefer, so the speakers can hone their presentations.

There's room for more! Anyone presenting a 15-minute talk, and a one-page outline, gets a Certificate from CSTC for \$25 toward future education at a CSTC event.

-- See inside for registration details --

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, including Code 31 of Federal Regulation 10.6(g). This does not constitute an endorsement by these groups. A listing of additional requirements to renew tax preparer registration may be obtained by contacting CTEC at P.O. Box 2890, Sacramento, CA 95812-2890, or phone CTEC at (877) 850-2832, or on the Internet at www.ctec.org.

Dear Members,

What is CSTC? It's an organization of about a thousand tax professionals who care about developing and sharing their knowledge of tax issues. They are all volunteers. In short, CSTC is YOU!

Please remember our first name: California!
The society holds events, and so do each of the 15 chapters. Looking for a particular topic?
Need California hours before renewal?

Planning a trip to another part of the state, and want to meet colleagues while you're there? Call me! (I answer the phone faster than my e-mail.) I have a list of "coming attractions" which I put on the bulletin board at meetings, and I'd be glad to help you find what you need. I update the list by reading bulletins from other chapters, and checking CSTC's website.

As time goes by, our commitments change. So we are looking at making our chapter grow in helpful directions:

Changing our meeting night to Thursdays so members from outlying areas can attend without losing productive client time. This will probably not change until October, as our September speaker is already booked; Sylvia Lang will be coming up from San Diego.

Changing our meeting place: The service at Scott's has been excellent, but it's been hard for our chapter to make ends meet financially. PLEASE TELL US if you know of a meeting place in or near Sacramento; catering and buffet service are options.

Changing our meeting week to something earlier in the month: Meeting the last week gives us conflicts in May (Memorial Day), October (Halloween and CTEC deadline), November (Thanksgiving), December (Holidays), and January (clients coming in the door). Hey, folks, that's half of our meeting months! Give it some thought, and contact a member of the board.

Changing our chapter's name: Two suggestions were Capital District Chapter and Northern California Chapter. Tell us any others you can think of, and we'll include this on the ballot.

TASKS THAT KEEP A GOOD CHAPTER HEALTHY:

Select speakers or topics for the current and coming years. Wouldn't it be great to have a list

Speaking of the ballot, it's time to get some names on the slate. I won't be able to serve as president next year. All offices are open to new faces.

June's Meeting, a round-table discussion, was held at Mary Jo Melton's office. What a success! Not only did we have plenty of light, plenty of sharing, and good food (from a neighboring restaurant), we were actually able to turn a profit on the evening. George Fakhouri did a splendid job, as usual, of leading our discussion. Best of all: We did not have to cancel our meeting due to low turnout.

January Update: We haven't held one for a couple of years. Are you interested? Let a board member know!

Book sales: It's almost time to print order forms. The one for RIA's Federal and California tax handbooks has already arrived. Which books would you like our chapter to order?

I've been reading the bulletins of other chapters lately, and they have some wonderful ways of delegating the many tasks which keep a chapter going. The list given on the next page is a starting point. You may have other suggestions. Take a look and see if one of these tasks appeals to you.

I look forward to meeting you soon, and often.

Teresa Brady
President

ready by the end of January for the coming year's speakers?

Organize a January update course.

Plan a workshop for Quickbooks or Tax Book. (Other chapters have contacts.)

Plan a party for December, including installation of officers, and possibly an hour of education.

Work on the Fundamentals course: teaching, copying, advertising, mailing – many opportunities!

Take care of speakers for the current year, checking that they know what to expect, and so do we.

Review newsletter content, and keep it on deadline.

Send out the newsletter to e-mail members.

Send out the newsletter to members who can't do e-mail.

Audit our financial reports for 2007, or those for a neighboring chapter. (Can't be a current board member.)

Nominate a Member of the Year. CSTC has a helpful form.

Head the nominating committee.

Head the elections committee.

Check our website, and send updates to the Society webmaster.

Chair the book sale.

OBITUARIES:

Lawrence Scott, President of Greater Long Beach Chapter, January 20, in a mid-air airplane collision.

Lawrence (Larry) King, long-time member of San Francisco Bay Chapter, February 11, of liver cancer.

Be our contact point for member personal news (some call it “sunshine”): Births, marriages, health problems, and other events which would make good material for the bulletin. One bulletin includes a “happy birthday” list.

Offer to be a pick-up point for books for your community: Ideally one for the Sonoma/Vacaville area, one for Roseville/Auburn, one for Placerville/El Dorado, etc.

Head the membership committee, thinking of ways we can help our chapter and society grow.

Set up breakfast meetings for the months of tax season, as a chance to share problems and ideas.

Set up “Office Visits” for members to share documents and procedures which help their practices.

Take reservations for meetings – ideally, someone who can answer the phone promptly!

Prepare the sign-in sheets for meetings, once we know who's coming.

Hand around the sign-in sheets at meetings.

Prepare and collect evaluation forms, and summarize the evaluations.

Prepare and hand out education certificates (we usually “trade” them for evaluations).

“Telephone Tree” Are you a “people person”? Have we got a job for you! Calling 5 or 10 members or attendees a month, to invite them to the meetings. We could rotate the list a bit, calling different people each month. Jim Saleny, long-time member of San Diego Chapter, June 4.

HEALTH BULLETIN: Don Cowper, who has been a vital part of Sacramento Chapter's rebirth, is recovering well from a fall in May. Not only is he out of the hospital, but George Fakhouri reported he filled in for a speaker, teaching a class about Schedule D at a recent meeting for Central Valley Chapter.

SOCIETY NEWS: "2012 BY 2012": That's the theme for doubling the Society's membership within five years. Reach out to invite someone to join us. Sometimes they only need a nudge.

Sacramento currently has 46 members, including two new ones last month: Marcia DesJardins and Mary Pawlowski (formerly a member of Foothill Chapter).

CSTC will give a certificate for up to \$25 to each member who brings in a new member, good for education at a CSTC event. Just have the new member include your name on his/her application for membership.

Sacramento Chapter will sweeten the deal: We'll add a bottle of wine (while they last) – we purchased six bottles one month when attendance was low: two sparkling, two red, and two white.

Try this idea, open to all members: Have you spoken to another tax professional lately? Ask for their e-mail (or fax, or phone) so we can send them a bulletin or invite them to an event!

CLASSROOM SERIES: Some of these events are being held in Northern California, and one is even being held in Sacramento! Sign up as soon as you can for:

July 23, Entity Comparison and More, Victorville

July 28, Entity Comparison and More, SACRAMENTO

August 5, LLC Workshop, Anaheim

August 12 There Goes My House!, Modesto

September 8, LLC Workshop, Advanced, San Diego

September 19, Business Ethics and Taking Care of Your Business, Modesto

September 29, Entity Comparison and More, Pleasanton

October 24, There Goes my House!, Long Beach

November 8, Business Ethics and Taking Care of Your Business, Upland

November 14, LLC Workshop, Pleasanton

(More details are in the attached flyer.)

Speakers for these events are:

Entity Comparison and More: Morris Miyabara, EA (San Francisco Bay and San Jose Chapters), Lamar Edwards, and ADP

LLC Workshop: Basic: Morris Miyabara; Advanced, Beanna Whitlock, NSTP (If you've never heard either of these speakers, you're in for a real treat!)

There Goes my House! Ruth Godfrey, EA, and Sharon Hardy, EA, (Inland Empire Chapter)

Business Ethics and Taking Care of Your Business, Gary McKinsey, EA (Central Valley Chapter) and ADP

SAY IT LOUD, SAY IT PROUD, SAY IT ON YOUR BUSINESS CARD or letterhead: The CSTC directory CD includes the Society's logo. You are welcome to print this on your business card or letterhead as long as you include the words "Member Of".

NEED A NAME TAG? Sometimes these get lost, or sometimes we change chapters. I have a few on a list, so let me know of your name needs to be added.

On the Lighter Side: Westheimer's Time Estimation Rule:

Estimate the time you think it should take, Multiply by 2, Add 3, and Change the unit of measure to the next higher unit. – Does this work for you?

CSTC MISSION STATEMENT

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

SACRAMENTO CHAPTER OFFICERS & DIRECTORS:

President	Teresa Brady	(916) 717-0876	taxlady.bunch@sbcglobal.net
	(RESERVATIONS)		
1 st Vice-President	Hank Roitman	(916) 456-2226	hank@roitmantax.com
	(Education Committee Chairperson)		
2 nd V-P, temp	Anthony Bustos	(714) 573-0403	adbtaxman@sbcglobal.net
Past President	Mary Jo Melton	(916) 971-6220	MJMTAX1@aol.com
	(Nominating Committee Chairperson, Parliamentarian)		
Treasurer	Dennis Larson	(916) 484-1040	dlars@sbcglobal.net
Secretary	(vacant)		



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