



California Society of Tax Consultants

Society Office
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SACRAMENTO CHAPTER – **EXTRA** -- JULY 2008

LOCATION CHANGE DUE TO LIGHT

ATTENDANCE: Did you miss us last month? If you had made a reservation, we would have called you about the change.

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

MONTHLY MEETING JULY 29, 2008

**Office of Mary Jo Melton, 6130 Fair Oaks Blvd., Suite D, Carmichael
Call for directions (916) 971-6220**

6:00 pm Dinner
7:00 pm Education Presentation

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

1 Hr. Federal, 1 Hr. California

CTEC #1000-CE-2496

Joan McHugh, CPA – Preparing California Returns for Registered Domestic Partners
Teresa Brady, CRTP – Adoption Credits and Introduction to Divorce Issues

Joan McHugh has been a valuable member of our audience for years, asking valuable questions and giving us good information.

Teresa Brady has been doing tax returns since 1988 as a CRTP. Her home office is in Folsom.

Come listen to both, and give them evaluations to help them in future speaking engagements.

-- 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,

It may seem soon to ask, but it's time to ask for **nominations for office**. Each chapter is expected to have:

President
Vice President (better with two!)
Secretary
Treasurer
Committee chairs:
 Audit
 Education
 Finance and Membership

It's also great to have one or more directors on the board – the ones we elected last year made wonderful contributions.

Full descriptions of these offices will be in a bulletin early next month.

Without nominees, the chapter may have to close, and where would that leave us? We would have to drive to Modesto, San Francisco, or San Jose for CSTC meetings; or find other sources for education and camaraderie.

I once read, "It's the part of the blanket that hangs over the bed that keeps you warm." I believe we each do a little more than we have to for our clients – maybe a neat presentation folder, maybe a forecast of the coming year so the clients can plan their refunds. Hank has coloring pages for "future clients of . . ." and a computer which clients' children can use while their parents are busy having their tax returns prepared.

Now it's time, in the words of President Kennedy, to "Ask not what your country can do for you, ask what you can do for your country." -- or in this case, for your chapter and your colleagues.

I'm getting excited about New Speaker Night. I've been rehearsing in my car as I go about my errands. The Adoption Credit is dear to my heart, as I adopted my daughter the year after it became available.

I look forward to meeting you soon, and often.

Teresa Brady
President

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 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.

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 reference books for your community: Ideally one for the Sonoma/Vacaville area, one for Roseville/Auburn, one for Placerville/El Dorado, etc.

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 27 members who have paid dues for the year which started July 1. Thank you! Another 19 were members last year, and need to renew.

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.

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.

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.

CLASSROOM SERIES: The latest flyer is attached as a PDF.

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.

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DINNER RESERVATION

Members with Reservation - \$30 each
Non-Members, Spouse, or Members w/o Reservation - \$38 each

PLEASE MAIL OR FAX by the deadline so that a meal will be available for you. If you have any special dietary needs such as a vegetable plate please advise TERESA at this time so you may be accommodated. You must call and make a reservation. If you make a reservation and are a no show, you will be billed for the dinner at the member cost. Also you must make a reservation in order that there are sufficient educational materials and outlines.

Reserve ___ place(s) for the Sacramento Chapter meeting Tuesday, July 29, 2008.

Reservations must be received (mail or fax) by **NOON, FRIDAY, JUNE 25, 2008**

SPECIAL PRICING: MEMBERS \$22, NON-MEMBERS \$26

Name: _____ Enclosed check payable to CSTC for \$ _____

ENTREE CHOICE: All meals received great reviews last month!

_____ Chicken "al la Parrila" Salad: large flour torilla shell filled with beans, romaine, olives, cheese, _____ grilled chicken breast

_____ Carnitas Plate: large chunks of tender pork slowly simmered in their own juices with garlic, orange and lime

_____ Steak Fajitas: tender steak seasoned and specially marinated, grilled with pepper, onions, tomatoes, with a mild sauce

_____ Burrito with Shrimp or (Telapia) Fish

MAIL/FAX TO: CSTC -- Teresa Brady
1360 Hartley Way, Folsom, CA 95630
phone (916) 717-0876 fax (916) 984-0475

MEMBER: Name: _____
Address: _____
Registration #: CRTP _____ EA _____ Other _____

GUESTS: Name(s): _____ Affiliation: _____

RESERVATIONS: Notify TERESA if you wish to be on the permanent list for the year. Remember that if you are on the permanent list, you must still pay unless you notify TERESA at least one day before the missed meeting. Your reservation and payment must reach TERESA by noon the Friday before the Tuesday meeting. Members not making reservations will pay \$38 at the door. Guests pay \$38. All reservations (permanent or not) that are no shows will receive a bill for the missed meeting. (Returned Check Charge is \$25)

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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	MIMTAX1@aol.com
	(Nominating Committee Chairperson, Parliamentarian)		
Treasurer	Dennis Larson	(916) 484-1040	dlars@sbcglobal.net
Secretary	(vacant)		



Sacramento Chapter
c/o Teresa Brady
1360 Hartley Way
Folsom CA 95630

