



Society Office
12419 Lewis Street, Ste. 106
Garden Grove, CA 92840
Phone: 714-750-2782 Fax: 714-750-2722
Visit us at www.cstcsociety.org

Chapter contact phone number-Teresa-916-717-0876

SACRAMENTO CHAPTER – JUNE 2008

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

MONTHLY MEETING JUNE 24, 2008

SCOTT'S SEAFOOD GRILL & BAR, 545 Munroe St., Sacramento

5:30 pm	Registration, Social and networking
6:00 pm	Dinner
7:00 pm	Education Presentation

TOPIC: **ROUND TABLE DISCUSSION** 1 hr Federal, 1 hr California CTEC# 1000-CE-2420

Your chance to present your challenges, quandaries, triumphs, and any other topics.

P.S. If you can think of a question, or answer a question, at this event – you can present a 15-minute education segment for next month's "New Speaker Night"!

SPEAKER: **GEORGE FAKHOURI, CPA will lead us in this discussion.**

He graduated from Santa Clara University with a B.S. in Accounting. He has been a CPA for 36 years and has been a tax preparer for over 39 years. George's tax practice is located in Manteca, California. He is Past President of the Central Valley Chapter and is a Past President of the CSTC at Society level.

-- 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,

As I drafted this, I was waiting to catch the Amtrak bus home from the Symposium in Reno. In addition to 24 hours of great education, both from the presenters and from the questions asked, I was able to:

Meet members and prospective members from all over California – and beyond.

Recruit a speaker for September.

Touch bases with several present and former Sacramento chapter members, and learn about concerns of some who don't get to come to our meetings very often.

Find out about an unexpected benefit of having my sister living with Mom and Dad.

Get more ideas about paperless office management, and its benefits for disaster preparedness.

Find someone local I can hire to educate me about improved data management and security.

Pick the brains of an IRS agent about which form to use, Power of Attorney, or 8821.

Meetings Past: Anthony Bustos, Thank you again for leading us on a tour of IRS audit and collection procedures. I'd probably hire an EA when a client needs representation, but I feel better knowing a bit about the terminology and what to expect.

Meetings Present: Round Table: This popular topic will again be led by George Fakhouri of Central Valley Chapter. Bringing your triumphs, tragedies, and questions helps us all become better preparers – so get a pad of sticky notes and start jotting!

Meetings Yet to Come: July 30, New Speaker Night: Once the Round Table has helped you realize you have at least 15 minutes' worth of valuable special tax knowledge, prepare a brief talk and a brief written outline. You might have recent experience about education benefits, or off-road fuel use credits, or employee business expenses (in the real world), or adoption, or RDP's, or – anything! Office practices can count for CPE credit, so tell us about forms, worksheets, or letters you have developed or use. Up to six of us can earn \$25 toward future education. Call me soon to be one of six presenters that night. I'll need to know the topics so we can get appropriate hours, Federal and/or California. Come on! I don't want to bore you by speaking all night myself!

Check out the "Society News" below for ideas on bringing in new members, and "This Year's Symposium" for a couple of things I picked up.

Hoping to see you soon,

Teresa Brady

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.

Try these ideas, open to all members, which were shared at the Leadership Workshop:

Bring a nonmember as your guest to one of our meetings. (If they join, you'll get a certificate for \$25 of education at any CSTC event.)

When nonmembers or new members are introduced at a meeting, make them welcome at your table, and try to learn at least three things about them or their practice.

Hernan in San Francisco Bay Chapter invites neighboring preparers, whether or not they are members, to meet for breakfast. The sharing gets them interested in joining.

CLASSROOM SERIES: Some of these events are being held in Northern California, and one is even being held in Sacramento! July 28 we will be able to learn more about Entities. Modesto will host events about Losing a House August 12 and Ethics September 19. See the enclosed flyer.

THIS YEAR'S SYMPOSIUM:

My most important classroom learnings:

The clearest explanation I've ever heard about the tax treatment rules for trading in a business-use auto. (You may be able to claim a deductible loss!)

How VITAL it is for ANY tax preparer to read, learn, and abide by Circular 230 – major law changes, for CRTP's, too!

This year's leadership workshop included learning our way around the latest Chapter Guide and its paperwork requirements, getting acquainted with chapter and Society leaders, being encouraged to let ourselves grow and soar as leaders, and an awesome session of exchanging ideas for getting and keeping members.

View from my room toward Sierras.



CUT HERE

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, June 24, 2008.

Reservations must be received (mail or fax) by **NOON, FRIDAY, JUNE 20, 2008**

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

ENTREE CHOICE:

- _____ BLACKENED PACIFIC SNAPPER
(Crispy brie polenta, sautéed spinach, ginger-lime citronette)
_____ GRILLED CHICKEN BREAST
(Garlic mashed potatoes, brandy-green peppercorn sauce)
_____ PASTA WITH VEGETABLES

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)

CUT HERE

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)		



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

