



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

SACRAMENTO CHAPTER – NOVEMBER 2008

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

MONTHLY MEETING NOVEMBER 18, 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 Presentation

2 Hours California

CTEC #1000-CE-2565

FRANCHISE TAX BOARD OVERVIEW STEVE SIMS, EA

Steve Sims has been employed by the Franchise Tax Board for over 20 years. He has worked as an auditor in Sacramento, San Jose and Oakland, as well as a collection supervisor and project manager. Mr. Sims has been the manager of the Community Services and Small Business Outreach section that is responsible for education and outreach efforts towards tax practitioners and small businesses. He is a graduate of California State University at Sacramento with a Bachelor of Science in Business Administration with an area of concentration in Accounting. He is an Enrolled Agent as recognized by the Internal Revenue Service. Mr. Sims also has practical, working knowledge as a small business owner.

Coming Attractions:

December	No Meeting – Enjoy the holiday season!
January 27	SHORT Dinner Meeting and Installation of Officers

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.

May 26

Probably an attorney on an advanced topic

Dear Members,

The nominating committee has some names now, and the election committee is drafting the ballot. Be sure to express your wishes, at both chapter and society levels, by voting!

David DuVal showed us the tip of the ethics iceberg in October. Can you remember when we had a hard time staying awake during ethics classes? Not anymore! There is too much opportunity for us to be fined, sued, or put out of business if we step seriously out of line.

October was also our first event with Shred Biz. Most of those who attended brought a box or more of papers to be shredded; I brought four. The cost was low, and it saved me hours of valuable time, while keeping those unneeded documents confidential for my clients. Let us know if you'd like to invite them again.

I also attended the IRS get-acquainted event November 4. It's a great idea to spend time getting more knowledge of the structure, and the people, who work so hard keeping our tax system working. Perhaps the most interesting statistic I heard was that only 20% of the people in attendance belong to ANY professional organization. There is apparently plenty of opportunity to recruit new members.

For November, we look forward again to welcoming Steve Sims of the Franchise Tax Board. His style of speaking keeps us alert, and he presents good information. Plan on another informative evening.

Our board had hoped to host an update class in early January. However, the speaker didn't know when he would be free until just this week, and that doesn't leave us enough time to do a proper job of presenting a good update. I'll work with his chapter to see if we can get him scheduled sooner next year. In the meantime, if you are still looking for a year-end update, consider the list of offerings in other CSTC chapters given below.

Hoping to see you soon, and often,

Teresa Brady

Wanted-experienced EA to prepare returns & manage growing business in So Placer Co. Will consider partnership and/or office sharing relationship for EA with existing practice. Seasonal full time and post-season flex-time. Qualified candidates should have 5yrs experience, knowledge of Taxworks software, Quickbooks, and the client interview. Email resume to marciab@foothill.net

Advertising Policy

Members may place an ad of business-card size or 6 lines of text at no charge. Nonmembers pay \$15. Advertising does not constitute endorsement by the Sacramento Chapter of the CSTC.

Update Courses Around CSTC: For details of these or other out-of-chapter events, call Teresa Brady

<u>Date(s)</u>	<u>Hosted By</u>	<u>Title</u>	<u>Speaker(s)</u>	<u>Hours</u>
Nov 12	High Desert	California Update	Roger Oakland	2 CA
Dec 4-5	Society, Anaheim	Tax Bridge to 2009	Several	16 total
Dec 9	Central Valley	Federal and CA Updates	Eugene Ostermiller	4 Fed, 4 CA
Jan 6	San Diego, El Cajon	Running Start	Gorsich & Karll	8 total
Jan 8	San Diego	Running Start	Gorsich & Karll	8 total
Jan 9	San Diego	Running Start	Gorsich & Karll	8 total
Jan 9	Orange	Quickfinder, Individual and Bs		8 Fed if both
Jan 10	N. County, Escondido	Running Start	Gorsich & Karll	8 total
Jan 10	San Francisco Bay	Federal and CA Updates	Eugene Ostermiller	4 Fed, 4 CA
Jan 14	High Desert	Quickfinder	not sure yet	2 Fed
Jan ?	Central Valley	Quickfinder	call for Teresa Brady for details	

Also special offerings:

Nov 18	Central Valley	Taxation of Clergy Wrkshop	DiMatteo & Parks	3 Fed, 1 CA
Nov 18	Central Valley	Taxation of Clergy Dinner	DiMatteo & Parks	1 Fed, 1 CA

OBITUARY:

The CSTC office sent me the following about a Sacramento Chapter member:

Sam Bernard passed away on Saturday, October 11.

He joined ISTC in 1980. He was the Orange County Chapter President in 1987, and Society President in 1992. Sam was very active in ISTC/CSTC, holding various positions on the Society and Chapter Boards.

Sam was retired from the military. He and his wife love to play golf, so in 1997 they moved to Penn Valley, CA, where they bought a house on a golf course.

He is survived by this wife, Judy, and two daughters.

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DINNER RESERVATION

Members with Reservation - \$22 each

Non-Members, Spouse, or Members w/o Reservation - \$26 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, NOVEMBER 18, 2008.

Reservations must be received (mail or fax) by **NOON, FRIDAY, NOVEMBER 14, 2008**

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

_____ Vegetarian Burrito

MAIL/FAX TO: CSTC – MARY JO MELTON
6130 Fair Oaks Blvd. Carmichael, CA 95608
phone (916) 971-6220 fax (916) 971-6221

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

GUESTS: Name(s): _____ Affiliation: _____

(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	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

