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## SACRAMENTO CHAPTER – OCTOBER 2008

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

**MONTHLY MEETING OCTOBER 28, 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 Federal

CTEC #1000-CE-2537

### **ETHICS**

David DuVal, EA

#### **DAVID DU VAL**

An Enrolled Agent, David Du Val is currently Tax Service Manager and Tax Instructor for the Sacramento and Orange County offices of TaxResources, Inc., which employs many CSTC members. He holds a master's degree in education and has been teaching since 1972. With over thirty years of experience in the tax field, he has prepared thousands of tax returns and has trained and mentored hundreds of students and aspiring tax professionals. He is a member of OCEA and NEA.

#### **ABOUT TRI**

TaxResources, Inc. is the oldest and largest income tax audit defense company in the country. In addition to federal and state audit defense, TRI's services include professional tax return reviews, tax research and advice for individuals and businesses, and special programs to support tax professionals. TRI's strategic partners include Intuit, General Electric Financial, the Medical Society of the State of New York, and numerous other professional associations and organizations.

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](http://www.ctec.org).

## **Coming Attractions:**

November 18	(SPECIAL DATE TO AVOID THANKSGIVING!) Franchise Tax Board, 2 Hours California
December	No class – Enjoy the holiday season!
Early January	Update? We're talking with an experienced speaker.
January 27	CANCELLED – Board members have noticed very light attendance in past years
May 26	Probably an attorney on an advanced topic

## **Dear Members,**

We're starting to enjoy autumn weather now, with cooler air, wind, and even a first rainy day. The bustle of extension season is drawing to a close, we're renewing our registrations, and the State CSTC ballot is on my desk, awaiting my attention.

I was unable to attend September's class on Foreclosures (due to a sudden health problem). I hope those of you who attended found Sylvia Lang's presentation valuable – I know she's quite a lady!

(Mary Jo – Add your own impressions?)

For October, we look forward again to welcoming David DuVal on the topic of Ethics. (Next year, this will be a requirement for all CTEC preparers!) Mr. DuVal's class on assets last year challenged us all, regardless of experience. Ethics is perhaps the greatest minefield in any business, beyond mere law, to acting in ways that let ourselves sleep well at night. I look forward to getting Mr. DuVal's perspective.

The Franchise Tax Board is scheduled to appear November 18, the Tuesday before Thanksgiving week. Do you have anything you'd especially like for them to cover? It can be very helpful to learn the point of view of the people who examine our work.

We won't be meeting at all in December, and the board decided not to hold a late-January meeting, as many of us are getting too busy to attend. We are working on an early-January update, but I am waiting to hear from the speaker we have in mind.

What will happen next year? There may be no chapter at all unless we get some nominees for officers. I could explore the other Northern California chapters, but I'd miss the camaraderie of all of you Sacramento Chapter members.

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](mailto: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 14	High Desert	Quickfinder	not sure yet	2 Fed

Also special offerings:

Oct 27-28	Central Valley	Retreat, including Nonprofit Org's	Several	12 Fed, 4 CA
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

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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, OCTOBER 28, 2008.

Reservations must be received (mail or fax) by **NOON, FRIDAY, OCTOBER 24, 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	<a href="mailto:taxlady.bunch@sbcglobal.net">taxlady.bunch@sbcglobal.net</a>
	(RESERVATIONS)		
1 <sup>st</sup> Vice-President	Hank Roitman	(916) 456-2226	<a href="mailto:hank@roitmantax.com">hank@roitmantax.com</a>
	(Education Committee Chairperson)		
2 <sup>nd</sup> V-P, temp	Anthony Bustos	(714) 573-0403	<a href="mailto:adbtaxman@sbcglobal.net">adbtaxman@sbcglobal.net</a>
Past President	Mary Jo Melton	(916) 971-6220	<a href="mailto:MIMTAX1@aol.com">MIMTAX1@aol.com</a>
	(Nominating Committee Chairperson, Parliamentarian)		
Treasurer	Dennis Larson	(916) 484-1040	<a href="mailto:dlars@sbcglobal.net">dlars@sbcglobal.net</a>
Secretary	(vacant)		