

SEMINAR SCHEDULE

THURSDAY, DECEMBER 3RD

- 7:00 Registration & Continental Breakfast
- 8:00 Federal Update – Bonnie DeSimone, EA
- 9:40 Refreshment Break
- 9:55 Bonnie DeSimone - continues
- 11:40 Lunch
- 12:50 Home Sweet Home – Lisa Ihm, EA
- 2:30 Refreshment Break
- 2:50 Lisa Ihm – continues
- 4:30 Adjourn

FRIDAY, DECEMBER 4TH

- 7:00 Registration & Continental Breakfast
- 8:00 California Tax Law & Agency-
Vicki Mulak, EA
- 9:40 Refreshment Break
- 9:55 Vicki Mulak - continues
- 11:40 Lunch
- 12:50 Select One

#1 Did You Know? Lisa Ihm, EA	#2 Small Business Tax Breaks William Rogers, EA
----------------------------------	---
- 2:30 Refreshment Break
- 2:50 Select One

#3 Mortgage Interest Linda Beckett, EA	#4 Social Security & Medicare Frank Van Nostrand
---	--
- 4:30 Adjourn

REGISTRATION
BEGINS
AT 7:00 A.M.

Your Registration Fee Includes:
• Educational Materials
• Continental Breakfast
• Lunch

For more information visit us at www.cstcsociety.org

PERMIT STD
 US POSTAGE
 PAID
 SAN BERNARDINO CA
 PERMIT 2968



California Society of Tax Consultants
 12419 Lewis Street, #106,
 Garden Grove, California 92840

CSTC TAX BRIDGE to 2010

Thursday & Friday
December 3rd & 4th
Anaheim Plaza Hotel
Anaheim, CA

**4 Hrs State
12 Hrs Federal**



California Society of Tax Consultants
 Federal & California Update
 CTEC #1000-CE-2854
 Register by
 October 3rd and save

TAX BRIDGE TO 2010

REGISTRATION

Name _____

Address _____

City/State _____ Zip _____

Phone (_____) _____ Email _____

Circle One: CTEC EA CPA Other _____ Number _____

Member of _____ Chapter of CSTC

Charge my: (circle one) VISA MC

Card No. _____ Exp. Date _____

Signature _____

Security Code ___ _ _ Check enclosed

Please check here if you require special accommodations.

REGISTRATION FEES

	By Oct 3	By Nov 6	After Nov 6	
Member..... @	\$295	\$305	\$355 x=\$ _____
Staff..... @	\$335	\$345	\$395 x=\$ _____
Non-Member..... @	\$395	\$410	\$445 x=\$ _____
Dues (\$130) & Initiation Fee (\$25) = \$155			x=\$ _____
(Initiation Fee waived if join with registration)			TOTAL \$	_____

Join CSTC - Take advantage of member rate

CIRCLE ONE CLASS FOR EACH SESSION

Day 2 12:50 pm - 1 or 2 2:50 pm - 3 or 4

LIMITED SEATING ALL SESSIONS

- **NO SHOW POLICY: NO REFUND**
- **REFUND FOR CANCELLATION:** Fee less 10% for costs & handling will be made only if requested before Nov. 13, 2009.
- **NO SMOKING IN MEETING ROOMS**

For more information visit us at www.cstcsociety.org

Mail Completed Registration Form To:

CALIFORNIA SOCIETY OF TAX CONSULTANTS

12419 Lewis Street, #106, Garden Grove, California 92840

(714) 750-2782 FAX (714) 750-2722



Linda Beckett



Bonnie DeSimone



Lisa Ihm

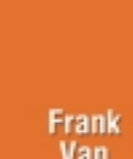
SPEAKERS & TOPICS



Vicki Mulak



William Rogers



Frank Van Nostrand

BONNIE DeSIMONE, EA

This session provides comprehensive analysis of the latest tax laws and IRS developments that will affect the preparation of 2008 tax returns. It will include: 2008 Economic Stimulus Act, Bonus Depreciation, Increased Section 179, Indexing Provisions, Mortgage Forgiveness Debt Relief Act Provisions Effective 2008, Potential Zero Capital Gains, New Kiddie Tax Rules, New IRS Regulations and Procedures, and Extenders and last-minute developments.

FEDERAL UPDATE

4 FEDERAL HOURS

VICKI MULAK, EA

This presentation will highlight the most important changes to 2009 California tax forms, rates and e-services highlighting significant items of interest to the California tax professional. A comprehensive, sequential coverage of 2009 California legislation is always an integral part of the presentation, and is information you will not want to miss as you prepare for the upcoming filing season. Areas of conformity and non-conformity to federal legislation will be addressed as well as recent procedural changes, rulings and other trends affecting practice before the 3 California Tax Agencies (FTB, EDD and BOE).

CALIFORNIA UPDATE

4 CA HOURS

LISA IHM, EA

The tax breaks allowed to homeowners make it easier to afford a home, but those benefits include much more than just a deduction for interest and real estate taxes. We'll look at both the old and new First-Time Homebuyer Credits and determine how to use them to the best advantage of our clients, with surprising results. New rules for "nonqualified use" may make some of the gain from a sale taxable. How do you calculate and report that gain and can we help our clients plan to avoid some of the tax? New energy credits have higher limits and allow more types of purchases. The deductibility of interest is being challenged by the IRS and FTB. We'll learn how to use the interest tracing rules correctly and to our clients' best benefit. Profit on a portion of a home used as a home office can be excluded, but does that also mean a loss is not deductible? Maybe not! We'll review the latest court case on the subject. We'll also discuss reverse mortgages, refinancing, mortgage insurance premiums, lien relief for homeowners, points, withdrawals from IRAs for home purchases, and much more.

HOME SWEET HOME

4 FEDERAL HOURS

LISA IHM, EA

We've all had those "light bulb" moments when we realize that we've been missing out on a great deduction for a client or have overlooked a perfect tax planning opportunity. These revelations come from many sources. Sometimes it's the one really useful piece of information we learn at a seminar, or a

DID YOU KNOW?

colleague mentions something at lunch that gets us to thinking, or we are researching another topic and come across something totally unexpected, and sometimes clients even bring us a newspaper clipping that presents a great idea. Hundreds of preparers have shared their most useful tidbits of tax preparation knowledge for this seminar. I guarantee you'll have a least one "AH HAH!" moment, guaranteed! (This is all new material since last year's Tax Bridge!).

SESSION #1 - 2 FEDERAL HOURS

WILLIAM ROGERS, EA

This workshop will discuss the often overlooked and misunderstood tax benefits that exist for small business. In this workshop we will discuss the Domestic Production Activities Deduction, Research & Development Tax Credit, Enterprise Zones and Hiring Credits, and special benefits for exporters.

SMALL BUSINESS TAX BREAKS

SESSION #2 - 2 FEDERAL HOURS

LINDA BECKETT, EA

In this session we will review the rules about Qualified Home Mortgage Interest; Interest Tracing and Allocations and Real Life Examples of Application of the Rules.

THE INTERESTING THINGS ABOUT MORTGAGE INTEREST

SESSION #3 - 2 FEDERAL HOURS

FRANK VAN NOSTRAND

This session will cover what you need to know about Social Security while you are working; What you need to know about benefits; Benefits for your family; When you are ready to apply for benefits; and the Supplemental Security Income (SSI) program.

THE NUTS & BOLTS OF SOCIAL SECURITY

SESSION #4 - 2 FEDERAL HOURS

For more information visit us at www.cstcsociety.org

HOTEL RESERVATIONS:

Anaheim Plaza Hotel, 1700 South Harbor Blvd., Anaheim, CA 92802

CALL RESERVATIONS DIRECT 1-714-772-5900 or 1-800-228-1357

\$60.00 Single or Double (Plus 15% County Tax) Reservation

requests received after November 20, 2009 will be confirmed

subject to room availability. One night's deposit is required to guaran-

tee accommodations. No refunds will be issued if the reservation is

canceled less than 72 hours prior to arrival.

This presentation has been designed to meet the requirements of the Director of the Office of Professional Responsibility of the Internal Revenue Service including code 31 of Federal Regulations 10.6(g); the California State Board of Accountancy; and the California Tax Education Council. 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 PO Box 2890, Sacramento, CA 95812- 2890, or phone CTEC at 877-850-2832, or on the internet at www.ctec.org.