

# CSTC ♦ Temecula Valley

PUBLISHED FROM MAY THRU JANUARY EACH YEAR FOR MEMBERS AND FRIENDS OF THE TEMECULA VALLEY CHAPTER OF THE INLAND SOCIETY OF TAX CONSULTANTS

## Calendar of Meetings

The first Wednesday of each month at 5:30 pm at **Richies Real American Diner** at 40651 Murrieta Hot Springs Road Murrieta CA 92562 951-696-5504

**August 4th — Alexandra L Kaplan** Practice Management and Business Skills

**September 1<sup>st</sup> — Gary Quackenbush-**  
[www.GQLaw.com](http://www.GQLaw.com) Estates & Trusts

**October 6<sup>th</sup> — David Du Val— Ethics**

**November 3 — To be Announced**

**December 1<sup>st</sup>) — David Du Val-** Audit Representation Issues

## Events of the Interest

### Society Board Meetings:

**9/9/10** Basic Tax Course @South Coast College 2011 W Chapman AVE Orange, CA \$299.00  
Phone 714-750-2782

**9/20/2010** Society Board Meeting

11/15/2010 Society Board Meeting

**IRS FORUMS:** 8/24-26 Las Vegas,  
8/31-9-2 San Diego, CA

## Speaker: Alexandra L Kaplan, MBA, SPHR

Alexandra L. Kaplan, MBA, SPHR is business consultant, trainer and coach with Mark Kamin and Associates, a world class, national consulting firm. She works with entrepreneurs, professionals, business owners, leaders, and organizations – nationally and internationally – in producing extraordinary results in their business performance, and creating and realizing new futures for their organizations.



Having worked as an executive for a wide range of companies across multiple industries, she possesses a strong leadership and management background to support organization’s vision and strategy. She is **dedicated to achieving results that improve performance and increased productivity** and has over 20 years of Business Consulting and Human Capital Development experience.

Alexandra delivers

- A new way of looking at yourself and your business so that anything is possible
- Dramatic increase your revenue, profits, and improve the bottom line
- Breakthrough improvements in performance, effectiveness and leadership

**Alexandra L Kaplan** ✉

**REMINDER:** Wear your badge to be eligible for the monthly drawing at our dinnermeetings. The drawing is for \$10 off to any future dinner meeting.



**H**ave you heard about the new Preparer Regulations? The 8<sup>th</sup> Objective of the California Society of Tax Consultants is “To monitor regulations of the tax professional in the interest of the profession and the general public.”

Not only has our Chapter been actively engaged in monitoring what is coming our way concerning the new Federal Preparer Registration, your State Society Board has also been active in the discussions as well.



Long before the new procedures were drafted, your California Society of Tax Consultants Board of Directors discussed and made recommendations on your behalf. It was the Society Board’s opinion that Tax Professionals in California should be “grandfathered” or “exempt” from Federal regulation, because we already had a registration requirement.

However, the Federal Legislature decided that there would be no exceptions, and that Tax Preparers in states that already had registration processes in place would not be treated differently from those who did not.

In consideration of the Objectives of Society, I think that this was the most appropriate decision. To make exceptions would not have been in the interest of the public. Although most of us only practice in California, there are many times we are preparing another state’s return. In addition, some of us prepare returns by mail for clients who reside in other states. By requiring all Tax Professionals to meet the same level of competency, the status of the Tax Professional will be lifted to a higher standard. Not only does this protect our interest as an industry, but it also protects the interest of the general public.

Although this new registration process may seem cumbersome and unnecessary to those of us who already maintain a higher standard of professionalism with continuing education and ethical practices as a Society member, it seems as though it is time to set some national standards as well.

So if you have not heard about the new Preparer Regulations, come to our next meeting for an update from your California Society of Tax Consultant friends! .♥

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## **CSTC –Temecula Valley**

Meeting Agenda **Richies Real American Diner**

40651 Murrieta Hot Springs Road Murrieta CA  
62562 951-696-5504

4:30 PM Board Meeting

5:00 PM Networking & Registration

**5:30 PM 1<sup>st</sup> Session:**

**6:30 PM Dinner Served**

**7:30 PM 2<sup>nd</sup> Session**

Members **\$20**

Non Members **\$30**

*Cost includes meal chosen from the menu not over \$11.00. Amount over limit paid by member. ♥*

Approved by CTEC for 2 hours of **IRS** Continuing Education Credit (1000-ce-3108).



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## **Days to celebrate in August:**

- Aug 5<sup>th</sup> International Forgiveness Day
- Aug 15<sup>th</sup> National Relaxation Day
- Aug 25<sup>th</sup> Kiss and Make Up Day
- Aug 26<sup>th</sup> Woman’s Equality Day



## **THOUGHT FOR THE DAY**

Please help the Postal Service erase their \$200 million debt by buying the Forever Stamp now before the rates go up in May 2011.

Officers	2010
President Sandi Goodwin	<b>951-733-8308</b> mspencil@earthlink.net
<b>First Vice Pres, Selina Steele</b>	<b>951-676-3443</b> ptc@iinet.com
Secretary Myra Crisologo	<b>951-695-1998</b> Myra.Crisologo@gmail.com
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Newsletter Scribe Dennis Martin	<b>951-926-3065</b> dennismartin@dslextreme.com
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## Great new <sup>New!</sup> Roth Conversion resources:

[NEW! Roth Conversion Calculator with Distributions](#)

### More NEW Roth Conversion resources:

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c/o Dennis Martin  
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