

CSTC Temecula Valley

PUBLISHED FROM MAY THRU JANUARY EACH YEAR FOR MEMBERS AND FRIENDS OF THE TEMECULA VALLEY CHAPTER OF THE CA 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

November 3 — WILLIAM E. ROGERS, MBA, CFPTM, CLU, EA— “Overview of the HIRE Act, Tax Benefits of the Affordable Care Act, & Other Legislative Developments”

December 1st — David DuVal EA—**Audit Representation**

January 12th — White Elephant Meeting Members Free, Guests \$20.00

February 6th — 7:30 am Weekly-**Thursdays** thru in March is the Breakfast **Share & Solve Roundtable** at *Richie’s* More Info later — Ed

Events of the Interest

Society Board Meetings:
11/15/2010 Society Board Meeting

IRS Stakeholder meeting San Bernardino 12/1/10

IRS FORUMS


Tax Bridge Anaheim Dec 2 and 3.

November Speaker:

WILLIAM E. ROGERS, MBA, CFPTM, CLU, EA

William E. Rogers is the founder of Ascend Business Advisory, a small tax and financial advisory firm in San Diego, CA. He has been active in the financial services industry since 1996. He is a Certified Financial Planner, a Chartered Life Underwriter, and an Enrolled Agent. He has a degree in Business & Management from the University of Redlands, a Master in Business Administration from the University of Southern California, and a Master of Science in Finance from Golden Gate University. Mr. Rogers is Past President of the North County Chapter of the California Society of Tax Consultants and Past President of the Palomar Chapter of the California Society of Enrolled Agents.



William Rogers specializes in the financial planning needs for small businesses. He is experienced in counseling small companies in the areas of tax planning, operations management, setting up management information systems, financial planning, employee benefits, and human resource management. Moreover, he has worked with a wide variety of businesses from different industries and sizes. Over the last eight years, he has developed a specialization in consulting e-commerce businesses. Thus, he has been instrumental in establishing a unique practice that supports the needs of Internet based companies. Finally, he has been a featured speaker for the Learning Annex, for the California Society of Tax Consultants, and the California Society of Enrolled Agents. Mr. Rogers is enrolled to practice before the IRS. 

President's Message

It's hard to believe that November is here already and the holidays are just around the corner along with a new tax season. We have had some great speakers this year and I know November & December will be no different.



At our meeting this month, we will be taking orders for the **Quick finder or Tax Book**. Remember, if you have attended five meetings (including November) you are eligible for a free individual Quick finder or TaxBook. If not, they are offered at a discounted rate.

It is also time to start thinking about our officers and directors for the coming year. I hope you will all consider stepping up and taking an office. We will have a nominating committee and elections will be held in December.

**Start thinking
about our officers
for the coming**

Your Board of Directors has discussed hosting another seminar next year. We need to plan and get on the CSTC Society calendar. If you have any suggestions for seminars that you would like to have, please contact Selina or myself. In addition, if you have speakers or topics you would like to have at our meetings, please let us know.

See you at our November meeting.



Happy Thanksgiving, Sandi Goodwin—President ♥

CSTC has professional-**logo-long-sleeved shirts** that are for sale. The shirts are \$32 each. If you are interested, please contact Beverly Switzer at 714-750-2782.



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 1st Session:

6:30 PM Dinner Served

7:30 PM 2nd 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 California Continuing Education Credit (1000-ce-_____)

California Society of Tax Consultants (CSTC), Inc. - Tax Bridge to 2010

Date(s): December 2 - 3, 2010

Time: 8:00 a.m. - 5:00 p.m.

Location: To Be Determined

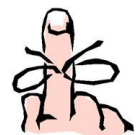
Contact: Bev Switzer; Phone: (714) 750-2782; E-mail: cstcsociety@sbcglobal.net

Event Information: CSTC Tax Bridge to 2011 provides 16 hours of continuing education credit.

Topics Include:

- Federal/California Updates
 - New Job Credits and Incentives
 - Franchise Tax Board
 - Correcting Depreciation and Estate Planning - What Do We Do After 2010?
- Scheduled speakers include Vicki Mulak, EA; Bonnie De Simone, EA; Lisa Ihm, EA; Gary Quakenbush, Attorney; Steve Sims, FTB Taxpayer Advocate; and William Rogers, EA.

Don't forget to wear your badge to the meetings.



Membership Quiz

This current member of the Temecula Valley Chapter of the California Society of Tax Consultants received a LLB (Law) degree from this international University. The University encourages students to follow these philosophical principals:

Excellence: The quality or state of being outstanding and superior; a feature or respect in which somebody or something is greater, better and more outstanding.

Integrity: The quality of possessing and steadfastly adhering to high moral principles or professional standards; the state of being complete or undivided.

Social justice and fairness: Fairness or reasonableness, especially in the way people are treated and and decisions and conclusions are determined; the condition of being just or impartial.



In which of the following countries did this Temecula Valley CSTC member receive an LLB degree?

A. Great Britain	C. South Africa
B. Germany	D. Philippines

Officers	2010
President Sandi Goodwin	951-733-8308 mspencil@earthlink.net
First Vice Pres, Selina Steele	951-676-3443 ptc@iinet.com
Acting Secretaries Elyse and Denise	See Below
Treasurer Aurora Schneider	626-675-3883 auroraschneider@yahoo.com
Denise Seyarto Membership Chair	951-677-2847 denisetax@yahoo.net
Director Tim Large	951- 679-6410 Timlargecpa@yahoo.com
Director Helmut Schneider	626-675-3883 Helmutschneider57@yahoo.com
Director Elyse Beltz	951-461-3108 QualityAssuredTaxes@airenetworks.com
Newsletter Scribe Dennis Martin	951-926-3065 dennismartin@dslextreme.com
Past Pres. Martha Rush	951-678-5405 Inarush74@msn.com
CSTC Society Budget Liaison	Shannon Henry batestax@aol.com

From Amy Smith of IRS Stakeholder Liason:

Making a Noticeable Difference

Presented by Wage and Investment Division

Date: November 17, 2010 (archived* for later viewing)

Time: 2 p.m. Eastern
This **FREE** webinar is for: Tax professionals



Description:

- The call for change -- why IRS notices needed revision
- The purpose of the Office of Taxpayer Correspondence
- The redesigned notices -- how they better meet the needs of the taxpayers
- Cross-channel coordinating -- using IRS.gov to support taxpayers who receive notices

Continuing Professional Education credit:

- This webinar is for information purposes only and will **not** offer a certificate of completion for obtaining CPE credit.

How to register for the session: Click on the link to register:

<http://www.visualwebcaster.com/event.asp?id=73366>

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*Professional Women's Roundtable,
Murrieta Chamber of Commerce,
and Professional Tax Consultants*

invite you to a Tax Workshop
Year-End Tax Savings/Planning
+ 2011 Tax Predictions Roulette
Tuesday, November 16, 2010
9:00am to 12:30pm (8:30am
Arrival Time)

Free Event

Murrieta Mesa High School
Gershwin Performance Arts
Theater

24801 Monroe Ave. Murrieta, CA 92562
What will 2011 bring us? What should you do before the year ends?

The following topics will be discussed:

(Speaker Selina Steele, Attorney & Enrolled Agent)

- Year End Strategies • Foreclosures/Shortsales
- Personal & Business Tax Issues
- Recent Tax Laws
- Bankruptcy • Estate & Trust Issues



PWR vision is to provide networking, leadership, educational and personal growth opportunities to a diverse group of emerging women business leaders in our community.
PWR participants meet on a regular basis to acquire and hone business development and other professional skills, to expand and strengthen their professional network, including their referral base, and to meet and cultivate new business prospects and resources.

NEW PTIN REGISTRATION

Paid preparers should apply for or renew their PTINs before January 1, 2011.

First, gather the information you will need to register your PTIN. PTIN Application Checklist at IRS.GOV

Then, you must create an account to register your PTIN PTIN Main Menu at IRS.GOV

Here is the latest information regarding to registering the PTINs.

When entering your address from your tax return, enter it EXACTLY as on the return. Capitalize, punctuate, and spell EXACTLY as on the return. We have noted that if your software enters a Suite Number or Apartment Number in a separate field from the street address, you may need to leave it off when registering on the website.

If experiencing problems receiving your initial password from the IRS after creating the account, first check your spam mail. Many are being caught up in spam. GMail is experiencing GRAVE trouble receiving the password from the IRS. I personally found that it would not come through. Use another host, such as Yahoo, AOL, or hotmail.

Issues surrounding the CAF number have been resolved. You may now enter a 9-digit number and 1-digit alpha as your CAF.

Certain Fields are NOT mandatory (i.e. the CAF field) If you do not have a CAF, EFIN, or other requested information, complete the registration without entering information in that field. ☺ Thanks from **Jen**, editor of the **Greater Long Beach CSTC Chapter Newsletter** — Ed

**c/o Dennis Martin
25901 Homeland Ave
Homeland CA 92548**



