



California Society of Tax Consultants

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MEMBERSHIP APPLICATION

Name _____ Name Badge _____

Address _____

City _____ State _____ Zip _____

Cell # _____ Work # _____ Fax # _____

Email _____ Preferred Chapter _____

Chapter Approval Required for Associate Members _____

Authorized Chapter Signature

CHAPTER AFFILIATION

I would like to be affiliated with the following chapter:

<input type="checkbox"/> Central Valley	<input type="checkbox"/> Orange County	<input type="checkbox"/> San Diego	<input type="checkbox"/> San Gabriel Valley
<input type="checkbox"/> Greater Long Beach	<input type="checkbox"/> Orange County South	<input type="checkbox"/> San Diego East County	<input type="checkbox"/> San Jose
<input type="checkbox"/> Inland Empire	<input type="checkbox"/> Orange County Wine Country	<input type="checkbox"/> San Diego North County	<input type="checkbox"/> Temecula Valley
<input type="checkbox"/> Los Angeles	<input type="checkbox"/> Sacramento	<input type="checkbox"/> San Francisco Bay	<input type="checkbox"/> Member-at-Large

MEMBERS (Active or Associate)

Meet any of one of the following requirements:

Enrolled Agent # _____ CRTP # _____ CPA or Attorney # _____

PTIN # _____

ACAT Accredited: Accountancy Taxation Both

NEW MEMBER RATES:

DUES	INITIATION FEE
\$175.00	\$25.00

Recruited by: _____

I hereby state that the accompanying statements are correct to the best of my knowledge and belief. I further state that I will abide by the Bylaws of the Society and will practice in strict conformity with the Code of Ethics adopted by the Society.

Applicant Signature _____ Date _____

Payment must accompany this application

Check # _____ or pay by Visa Mastercard Discover AMEX

Credit Card # _____ Exp. Date _____ Sec. Code _____

Billing Address _____

Applicant Signature _____ Date _____

CSTC CONNECTS QUESTIONNAIRE

Here's your chance to help other CSTC members. If there are areas below in which you have special experience or know-how, here's how you can help. After reviewing the list of categories, CHECK the categories (maximum of 3) in which you are willing to help other preparers. Other suggestions are Welcome. THIS SECTION IS FOR SHARING INFORMATION ONLY, NOT FOR SOLICITATION OF ADVERTISING.

- | | | |
|----------------------------------------------------------------------|---------------------------------------------------------------------|-----------------------------------------------------------------------------|
| <input type="checkbox"/> Accounting – Bookkeeping | <input type="checkbox"/> Exchanges, Section 1031 | <input type="checkbox"/> Pension/Retirement Plans – ESOPs |
| <input type="checkbox"/> Adoption | <input type="checkbox"/> Farming – Dairy | <input type="checkbox"/> Pension/Retirement Plans – SEPs |
| <input type="checkbox"/> Alternative Minimum Tax | <input type="checkbox"/> Farming – Groves | <input type="checkbox"/> Pension/Retirement Plans – Setting Up |
| <input type="checkbox"/> Animals – Breeding/Showing | <input type="checkbox"/> Farming – Other | <input type="checkbox"/> Pension/Retirement Plans – Tax Sheltered Annuities |
| <input type="checkbox"/> Animals – Racing | <input type="checkbox"/> Fiduciary Taxes | <input type="checkbox"/> Photographers |
| <input type="checkbox"/> Annuities | <input type="checkbox"/> Financial Planning | <input type="checkbox"/> Physicians |
| <input type="checkbox"/> Apartments – Management Companies | <input type="checkbox"/> Fire Fighters | <input type="checkbox"/> Prior-Year Returns |
| <input type="checkbox"/> Apartments – Managers/Residents | <input type="checkbox"/> Flight Attendants | <input type="checkbox"/> Private Investigators |
| <input type="checkbox"/> Apartments – Operating (see rentals) | <input type="checkbox"/> Foreign Income | <input type="checkbox"/> Psychologists |
| <input type="checkbox"/> Artists | <input type="checkbox"/> Foreign Language Preparers – Spanish | <input type="checkbox"/> Real Estate – Agents/Brokers |
| <input type="checkbox"/> At-Risk Limited (see K-1s) | <input type="checkbox"/> Foreign Language Preparers – Chinese | <input type="checkbox"/> Real Estate – Title Considerations |
| <input type="checkbox"/> Attorneys | <input type="checkbox"/> Foreign Language Preparers – French | <input type="checkbox"/> Registered Domestic Partners |
| <input type="checkbox"/> Audit Representation – Field Audits | <input type="checkbox"/> Foreign Language Preparers – Other | <input type="checkbox"/> Rental Property – Commercial |
| <input type="checkbox"/> Audit Representation – MSSP Audits | <input type="checkbox"/> Foster Homes | <input type="checkbox"/> Rental Property – Rental to Related Party |
| <input type="checkbox"/> Audit Representation – Office Audits | <input type="checkbox"/> Franchises | <input type="checkbox"/> Rental Property – Residential |
| <input type="checkbox"/> Authors – Writers | <input type="checkbox"/> Gamblers | <input type="checkbox"/> Rental Property – Vacation Homes |
| <input type="checkbox"/> Bad Debts – Collections | <input type="checkbox"/> Gift Tax Returns | <input type="checkbox"/> Repossessions |
| <input type="checkbox"/> Bankruptcy | <input type="checkbox"/> Homeowners Associations | <input type="checkbox"/> Residence – Office-in-Home |
| <input type="checkbox"/> Beauticians | <input type="checkbox"/> Hotels/Motels | <input type="checkbox"/> Residence – Exclusion |
| <input type="checkbox"/> Bed & Breakfast Inns | <input type="checkbox"/> Import/Export | <input type="checkbox"/> Residence – Sales |
| <input type="checkbox"/> Book Stores | <input type="checkbox"/> Inheritances | <input type="checkbox"/> Restaurants |
| <input type="checkbox"/> Business Trusts | <input type="checkbox"/> Information returns (1099s) | <input type="checkbox"/> Royalties – Authors/Writers |
| <input type="checkbox"/> Cab Drivers | <input type="checkbox"/> Installment Sales | <input type="checkbox"/> Royalties – Inventors |
| <input type="checkbox"/> Casualty Losses | <input type="checkbox"/> Insurance Agents | <input type="checkbox"/> Royalties – Oil/Gas/Mineral |
| <input type="checkbox"/> Catering | <input type="checkbox"/> Inventories | <input type="checkbox"/> Sales – Amway/Avon/etc. |
| <input type="checkbox"/> Churches (see Non-Profit) | <input type="checkbox"/> Investment Interest Limitations | <input type="checkbox"/> Sales – Mail Order |
| <input type="checkbox"/> Clergy (Taxation of) | <input type="checkbox"/> IRAs | <input type="checkbox"/> Sales – Retail |
| <input type="checkbox"/> Collections | <input type="checkbox"/> K-1s – At-Risk | <input type="checkbox"/> Sales – Wholesale |
| <input type="checkbox"/> Construction Trades | <input type="checkbox"/> K-1s – Basis | <input type="checkbox"/> Sales – Taxes |
| <input type="checkbox"/> Corporations | <input type="checkbox"/> K-1s – Oil and Gas | <input type="checkbox"/> Schedule C |
| <input type="checkbox"/> Day Care Providers | <input type="checkbox"/> Law Enforcement | <input type="checkbox"/> S Corporations |
| <input type="checkbox"/> Deceased Taxpayers | <input type="checkbox"/> Liquor Sales | <input type="checkbox"/> Service Stations |
| <input type="checkbox"/> Deductions (Unusual) – Contributions | <input type="checkbox"/> LLCs | <input type="checkbox"/> Social Security Benefits |
| <input type="checkbox"/> Deductions (Unusual) – Handicapped Expenses | <input type="checkbox"/> Manufacturers | <input type="checkbox"/> Sporting Goods |
| <input type="checkbox"/> Deductions (Unusual) – Legal Expenses | <input type="checkbox"/> Marriage/Divorce | <input type="checkbox"/> Stockholder – Employees |
| <input type="checkbox"/> Deductions (Unusual) – Medical | <input type="checkbox"/> Marriage/Divorce – Alimony/Child Support | <input type="checkbox"/> Stock Transactions – Mutual Funds |
| <input type="checkbox"/> Deductions (Unusual) – Special Schools | <input type="checkbox"/> Marriage/Divorce – Property Division | <input type="checkbox"/> Stock Transactions – Options/Commodities |
| <input type="checkbox"/> Delinquent Taxes | <input type="checkbox"/> Mechanics | <input type="checkbox"/> Stock Transactions – Small Business Stock |
| <input type="checkbox"/> Dentists | <input type="checkbox"/> Military | <input type="checkbox"/> Tax Credits |
| <input type="checkbox"/> Developers | <input type="checkbox"/> Moving & Storage | <input type="checkbox"/> Tax Planning |
| <input type="checkbox"/> Educators – College | <input type="checkbox"/> Net Operating Loss | <input type="checkbox"/> Tax Resolution |
| <input type="checkbox"/> Educators – Grants and Scholarships | <input type="checkbox"/> Non-profit Organizations | <input type="checkbox"/> Timeshares |
| <input type="checkbox"/> Educators – Primary and Secondary | <input type="checkbox"/> Non-Residents-1040NR | <input type="checkbox"/> Travel Agents |
| <input type="checkbox"/> Electricians | <input type="checkbox"/> Non-Residents-540NR | <input type="checkbox"/> Truckers |
| <input type="checkbox"/> Electronic Filing | <input type="checkbox"/> Nursing Homes | <input type="checkbox"/> Trusts |
| <input type="checkbox"/> Employees – Domestic | <input type="checkbox"/> Offers in Compromise | <input type="checkbox"/> Video Rentals |
| <input type="checkbox"/> Employees – Fringe Benefits | <input type="checkbox"/> Oil and Gas – Partnerships | <input type="checkbox"/> Waiters/Waitresses |
| <input type="checkbox"/> Employees – Temporary Jobs | <input type="checkbox"/> Oil and Gas – Royalties | <input type="checkbox"/> Workers Comp Reports – Audits |
| <input type="checkbox"/> Employees – vs. Contractors | <input type="checkbox"/> Oil and Gas – Wells | |
| <input type="checkbox"/> Employer Taxes | <input type="checkbox"/> Partnerships | |
| <input type="checkbox"/> Entertainers | <input type="checkbox"/> Pension/Retirement Plans – Civil Service | |
| <input type="checkbox"/> Escrow Statements | <input type="checkbox"/> Pension/Retirement Plans – Defined Benefit | |
| <input type="checkbox"/> Estate Taxes | | |