



APPROVED  
CONTINUING EDUCATION  
PROVIDER

Southern California Tax Professionals  
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<http://www.sctapro.org>

**We have important information in this newsletter**

Sign up become a SCTP member or renew your membership. [Renew your membership or become a member now.](#)

Lisa Ihm, EA., will hold an Enrolled Agent Exam Prep course. See our website, Upcoming Events for more details. [Click here for the flier](#)

[Register for the August 9, 2017 dinner meeting here](#)

Quick Finders are now on sale. [Order here!](#)

August 9, 2017 Dinner meeting

**Speaker: Phillip J. Rodriguez, CEO - The Dimirak Companies**

**Topics:**

- Data Breach
- Notification Laws, discussing what is your legal requirement in the event of a breach, or suspected breach (losing your phone or laptop)
- Network Security
- Privacy Injury
- Network Extortion
- Policy coverage, limits, endorsements, price, and talk about how affordable Cyber Insurance is.
- Technology Privacy and Security Self Assessment, and Recommended Minimum Practice (RMP)

**IRS# TBA CTEC#TBA**

**Dinner meetings are held at the Handlery Hotel & Resort  
950 Hotel Circle North  
San Diego, CA 92108  
619-298-0511**

Registration: 5:00 - 5:30 pm  
Dinner: 5:30 - 6:30 pm  
Speaker: 6:30 - 8:15 pm

**Dinner Reservations must be paid by the Friday prior to the dinner meeting.**



**Phillip J. Rodriguez, CEO - The Dimirak Companies**

Mr. Rodriguez has a distinguished career of over 30 years of experience in securities, and insurance. His experience extends from startups to New York Stock Exchange-listed companies, more specifically in the areas of Oil & Gas, and Real Estate syndication.

Mr. Rodriguez has advised and assisted clients in obtaining private equity or debt by building a selling syndicate of independent securities Broker Dealers throughout the United States.

Mr. Rodriguez' insurance agency, Dimirak Financial Corporation, was founded in 1981, and incorporated in 1983. Mr. Rodriguez has developed a platform for small business owners to educate (and insure) themselves on the risk, cost, and legal requirements associated in experiencing a Data Breach.

Dimirak specializes in offering insurance to the Tax Professional, and currently has over 5000 tax professional clients.

Mr. Rodriguez is a graduate of the University of California at Davis, CA. He is a licensed insurance broker, and holds his Life, Health, Variable Contracts, and Fire & Casualty licenses. He also holds the following securities licenses, Series 24, 53, 7, 79, 6, 65, 63, and 99.

Mr. Rodriguez' prior experience includes the position of CEO of two Southern California Broker Dealers, Empire Securities and Dimirak Securities. Mr. Rodriguez holds a Third Degree Black Belt in American Kenpo.

He resides in North San Diego County, CA, is married and has two sons.

**Membership-July 1, 2017- June 30, 2018: Renew or join now**

**SCTP Membership Renewals due Now**

**Membership Form**

**CTEC Required hours**

**10 hrs- Federal Tax Law  
3 hrs- Federal Tax Law Update  
2 hrs- Ethics  
5 hrs- California**

**Total of 20 hours**



### **SCTP President's Newsletter August 2017**

Dear Members and Colleagues,

Well here we are in the middle of summer again in beautiful Southern California. I count my blessings every day that I live in such a gorgeous part of the world!!

Our August educational meeting will be on Wednesday August 9th. The speaker will be Phil Rodriguez, CEO of The Dimirak Companies. He will be speaking on Cyber Scams including Data Breach, Network Security, Privacy Injury and Network Extortion. He will also talk some on how affordable Cyber Insurance is. It is sad to have to admit in this day and age we need cyber insurance but I'm afraid that we really have no choice in this matter anymore. Therefore Phil's class should prove to be VERY valuable to all of us!!

In September we will host a joint meeting with CSEA and the topic will be on stock options. I'll give you more details on the speaker and everything else in my next newsletter—SO—STAY TUNED, FOLKS!!!!

The invitation still stands to come early and sit in on a Board of Director's meeting. You can see what happens behind the scenes and I must say it has proven to be VERY entertaining in the past. I'm not one to kiss and tell but you REALLY ought to observe your Board in action!! And that's all I'm saying! LOL!

Respectfully,

***Joanne***

Joanne Schroeder, President, SCTP

<http://www.sctaxpro.org>



Dinner Menu:

**RESERVATIONS NEEDED**

Mixed greens house salad

Rolls and Butter

Santa Maria Tri-Tip - with Salsa  
Fresca, Cilantro Rice and Black Beans with Cotija  
Cheese

-or-

Vegetarian - Three Cheese Enchiladas

Chef's Choice Dessert  
Brewed Coffee, Decaffeinated Coffee and Tea  
Iced Tea

CONTACT ROSE CARTER AT  
PH. 619-698-0508 FAX: 619-698-9735 or email her at [rose.carter@sctaxpro.org](mailto:rose.carter@sctaxpro.org)

Make your reservations here. <http://www.sctaxpro.org>

ALL Dinner Reservations must be paid by the Friday prior to the dinner meeting. This is important for a more accurate meal count.

## SCTP Board

### Officers

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[Click here to contact Debbie Miller for any website questions you may have.](#)

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<http://www.sctaxpro.org>

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