General Meeting
NEXT MEETING Wed., September 20, 2006
Place: PLEASANTON Crowne Plaza Hotel
Go to http://www.ichotelsgroup.com/h/d/cp/1/en/hd/ccrjg
then click on Map/Directions for personalized directions
4:30 Board Meeting
6:15 Hospitality
6:45 Dinner Buffet
8:00 Program: Like Kind Exchanges
    with Michael Yesk, JD
Cost: $35.00 with reservation by 5pm Fri. 9/15
    $45.00 without reservation
Reservations: (800) 617-1040 or (925) 691-1866
email: registration@ebaea.org

STANDING RESERVATIONS
Our Chapter maintains a “Standing Reservations” list for
those EAs who attend most monthly meetings. If you
are on this list, you need to contact the Chapter office
only if you will NOT be attending the meeting. If you
wish to be added to or removed from the “standing res-
ervations” list, call (800) 617-1040

September Topic: Like-Kind Exchanges
    by Philip Fiegler EA, Program Chair
This month we are going to cover a popular
topic that everyone wishes to know more about. Most of
us know the basics of §1031 exchanges. We are going
to delve into some of the issues which are becoming
more prominent as our clients become more sophisti-
cated. We will look at exchanges in a few different
situations: TIC exchanges which are becoming very
popular, reverse and improvement exchanges, and part-
nership/LLC issues.
Is it a TIC or a partnership? What happens
when there is a split-up or division of partnership?

PRESIDENT’S MESSAGE
by Bonnie Buhnerkempe EA, CFP®, CSA
Welcome back to those of you who got some
vacation time in over the summer. I hope to see all of
you at this month’s dinner meeting. As most of you
know we are trying to do a better job of making the
EBAEA group a friendly and welcoming place so we
really appreciate when you wear your badge. If you
don’t have a badge, please sign up for one; if you have
already signed up for one before the Aug 5th deadline
your badge is waiting for you at the dinner meeting.

Make sure when you email your registration for
the dinner meeting you get your email confirmation. If
you don’t get your confirmation back within 1 business
day please let the chapter office know. I want to make
sure you get your discount if you register before the cut
off. If your registration is not in by the Friday before the
dinner meeting you will be paying the full price.

I hope you have registered for Tax Talk so you
can get all of the information on the latest tax law
changes that just happen even this past month. Remem-
ber to sign up soon so you can get the best pricing.

Do you want to know who uses the same soft-
ware you do? Do you want to know who you can ask
about tax software before changing? The communica-
tion team of our board is compiling a list based on the
tax software you use so we can help each other out if
there is a question or a problem with the software. Are
you thinking of switching software, ask some of the
people who use the software to get their opinion.

The board is working on some different ideas,
do you have an idea that needs to get put into place?
Remember you are welcome at the board meetings, they
begin at 4:30PM the same day as the dinner meeting.

*   *   *

interests? What happens upon termination of a partner-
ship? What is the proper way to park properties on a
reverse exchange? What are the rules for either buying
or selling to a related party? All will be covered, and
specific cites to Internal Revenue Code and regulations,
as well court decisions, will be provided.
Our speaker is Michael Yesk, JD, a qualified intermediary and the attorney-manager of the Northern California region for Investment Property Exchange Services, Inc. (www.ipx1031.com/yesk). He earned his undergraduate degree in Philosophy from the University of California, Berkeley, and his JD degree from the University of San Francisco. Mr. Yesk has been an attorney for 18 years. Before becoming the manager of the Northern California office of IPX1031, he represented various title insurance companies as both in-house and outside counsel. He has also represented contractors and owners in construction disputes, and other litigation matters. Mr. Yesk teaches 1031 tax exchange accredited courses to investors, real estate agents, escrow officers, accountants and attorneys.

Mr. Yesk is the co-author of “The Real Estate Investment Flow Chart,” which helps investors get started on the road to real estate wealth, and then to move from the residential real estate investment market to the commercial real estate market.

You can listen to Mr. Yesk on Rock, Roll and Real Estate, every Sunday morning at 10:00a.m. in the Bay Area on KNEW 910 AM, and in the Central Valley on KTRB 860 AM.

**QUICKFINDERS SPECIAL DEAL!**

*by Diann Gross EA*

Due to past difficulties with the deliveries of some of the orders, I had a meeting with the Quickfinders sales people, and I have made special arrangements with them this year. All orders with our code (Q521) on them will be specially group-priced and will be sent directly to you! (Be sure to use the GROUP PRICE on your order.) The Deadline will be 12/1/2006. Quickfinders will also be donating $5 per book to scholarship at CSEA. I am sure this will speed things up and be much more efficient for you this way. I urge you to make your orders early using the special code: Q521 See special forms below. Please call me at (925) 736-3853 voice/fax with questions.

**DINNER SUBSCRIPTIONS RENEWAL**

The Chapter has a program for convenient and cost-effective registration for dinner meetings – the annual subscription program. Pay in advance and you’ll get some nice discounts and you’ll never have to worry about calling in late or forgetting to bring your checkbook. Here’s the details:

Pay for eight dinner meetings ($35x8 = $280) and get the tenth free, PLUS you also get a voucher for $35 off a Chapter education activity during this fiscal year. That’s the equivalent of getting two free dinners! You can pay the annual subscription at the September dinner meeting. This is the last opportunity to subscribe for this fiscal year.

**EBAEA AMBASSADORS**

In an effort to promote networking and member retention, the East Bay chapter is launching an exciting opportunity. We are looking for Ambassadors to “work” the monthly dinner meetings. The role of the Ambassador is pretty simple: 1) When a new member comes to their first few meetings and is trying to get to know people, be willing to introduce them around, invite them to sit at your table, and include them in conversations. Have you considered yet a way to be involved? Is this something you can do? Well, can you answer warmly when a stranger comes to ask you a question? Can you introduce people? If you said yes, you could be an Ambassador! And best of all, this does not require a once-a-month-for-a-whole-year commitment. Can you do this for at least 3 meetings a year? This will also be a great way for YOU to meet some of the new members that come in and be instrumental in making them see the benefit of coming back.

If this Ambassador Program sounds like something you can help us with, please contact Judi Gilmer, EA at 925-373-1468, or call the Chapter Office at (800) 617-1040. No one should ever leave a dinner meeting feeling like an outsider. The East Bay Chapter is about Education and Networking, and the first contact for that is at our dinner meetings. YOU CAN make a difference in another EA’s career!

**STANDING RESERVATION DINNER LIST**

Now that the new fiscal year is here, the Chapter office needs to update the Standing Dinner Reservation list. If you are now on the list and would like to be taken off or would like to be put on the list, please call the Chapter office. Those who are on the Standing Dinner list, only have to call the Chapter office when you **cannot** attend a monthly Dinner meeting. Note that if you are on the list and DO NOT cancel your reservation, you WILL BE CHARGED for the dinner we have to buy, regardless of whether or not you attend the meeting. Finally, if you are on this list, please check each month to see if you need to tell us your choice of entrée.

**FLASH NEWS - DAMAGES NONTAXABLE!**

IRC Section 104 says that damages for non-physical injuries are fully taxable and not excludable under Section 104. The law was changed to this effect in 1996. In a very interestingly reasoned opinion recently, the DC Circuit Court of Appeals held that this provision is UNCONSTITUTIONAL except where the damages are for lost wages or similar compensation. Thus, for example, if they are awarded in a tort type action for loss to reputation, the DC Court would hold them non-taxable pursuant to the 16th Amendment to the Constitution. If you have clients that might be affected, you should check your research service for more information.
REMINDER - NEW DINNER POLICY

As most of you know the cost of everything keeps going up and we have been trying to keep the price of the dinner meeting low which means we have been losing money. Since that is not a financially responsible thing to do, at the February Board meeting we had a good debate on how to handle the situation. The conclusion was to raise the price of the dinner meeting but to have a larger discount if you register on time. Therefore, the cost of the dinner meeting effective May 2006 is $45 but there is a $10 discount if you register by 5:00PM the Friday preceding the meeting. If you have a reservation and need to cancel, you must do so by 5:00PM on the Friday preceding the meeting to avoid being charged. If you register at the door the cost is $45 as long as there is room (so if you register early, the price is only $35). IF YOU MAKE A RESERVATION AND DO NOT ATTEND YOU WILL BE CHARGED FOR THE DINNER YOU ORDERED.

EAS EXEMPTED FROM CONSERVATORSHIP AND GUARDIANSHIP REFORM ACT (SB 1550)

by Bronwyn Hughes, CSEA staff

Senator Figueroa’s office heard CSEA, “the voice for all EAs in California”, loud and clear and on August 24, 2006, SB 1550 (Figueroa) was amended to exempt Enrolled Agents from the professional fiduciary licensing provisions outlined in SB 1550.

SB 1550 is part of a four-bill package intended to address deficiencies in California’s conservatorship system. The bill, if signed into law, would create the Professional Fiduciaries Bureau and would require the Bureau to license and regulate professional fiduciaries.

SB 1550 would require a person acting or holding himself or herself out as a professional fiduciary (as defined in Article 1 of the bill) to be licensed as a professional fiduciary and would require a licensee to meet certain other requirements, including: filing an application for licensure signed under penalty of perjury, passing a licensing examination, payment of licensing fees set by the Bureau, submission of fingerprints for a criminal background check, and annually filing a statement containing specified information under penalty of perjury.

Thanks to the hard work and diligence of your CSEA Legislative Committee, Advocate, and staff, EAs are exempted from the professional fiduciary licensing requirements outlined in SB 1550. (CPAs, and Attorneys are also exempted from the requirements).

CSEA is the strongest voice EAs have in the California Legislature. Advocacy is the cornerstone to protecting your rights to practice in California and it does not happen without the support of Members. The CSEA’s Legislative Action Fund (LAF) needs your help!

If you have any questions or concerns, please contact Bronwyn Hughes, CSEA Staff, 800/777-2732, or bhughes@csea.org.

TAXTALK 2006

by Diane Jaworski-Faulhaber EA

The joint brochure for the fall seminars for North Bay, Golden Gate and East Bay chapters was sent out at the end of this month. There are a couple of minor changes to our program that were not in our chapter registration mailing. We now have an IRS speaker, Alan Hatcher, from TIGTA (Treasury Inspector General for Tax Administration, which oversees IRS operations). Alan will be concentrating on Circular 230 and 470 for our two hours of ethics.

We have also had a change of speaker for our Real Estate Day on Friday. Unfortunately Jerry Susman has become ill and will not be able to speak for us. We are replacing him with Bob Ching, who is a CPA and a 1031 exchange author. Bob comes highly recommended by Art Werner. If you have any special areas you would like included in this session, please send me an email.

Our speakers are very dedicated to education and are very willing to accommodate our special requests whenever they can.

I am very excited about expanding our seminar to three full days. This is a bold move for our chapter where other chapters are cutting back instead of expanding. But that’s us, isn’t it?! The East Bay Chapter takes the lead oftentimes!! So get your registrations in as soon as possible to help us better plan for our event. Thanks to those who have already registered and taken advantage of the early bird discount! If you did not get your brochure, please call me at (510) 538-0948 and I’ll send you one.

IN MEMORIAM, PRACTICE FOR SALE

We note with great regret the passing of Chapter member and Past President (1993-1994) James W. Hassing Jr. EA. The following is taken from the Contra Costa Times:

“James died June 6, 2006 in Walnut Creek, CA. He was born in Nebraska and raised in Washington State where he attended Eastern Washington University on a basketball scholarship. After serving for four years in the U.S. Army during World War II, he moved to CA and graduated from Golden Gate University with a degree in Business Administration. He was a tax accountant and the owner of an accounting and tax practice located in Alamo, CA.”

Although a family member is temporarily handling the modest tax and bookkeeping practice, the practice is for sale as a turnkey operation or it can be integrated into an existing practice. Condolences and inquiries may be directed to Jim’s office number of (925) 831-8945 or to Lauren Hassing at (925) 708-9746.
GOT TOO MANY CLIENTS? WANT MORE CLIENTS?

Every year, some members hit or exceed their capacity. We just have too many clients and too much work to do. Most of these are good quality clients who have come from good referrals, so we feel guilty about saying “no”. How do you scale back to more reasonable working hours without losing the value of these clients?

If you fit this profile, and you want to turn these clients (and maybe some of next year’s incoming referrals) over to another EA instead of some unqualified shmoe down the street, please call the Chapter Office. We will put you in contact with some Chapter members who are looking to grow their practices. Suitability, compensation and other issues are up to you to work out – we’re matchmakers, not marriage counselors!

Similarly, if you are looking to expand your practice, please give us a call and we’ll add you to the corresponding list.

NEW EA LOOKING TO HELP YOU

Yvette Koehler, EA (new member) is willing to do your simple easy returns and take them off your hands. Call (925) 735-2407 or email to ykoehler@sbcglobal.net. I thank you very much, Yvette.

TAX PRACTICE WANTED

EA interested in buying a Tax Practice. Will consider immediately buying part or all of a practice, or a gradual multi-year buy-in transition. Prefer Hayward/Castro Valley/Pleasanton and surrounding areas. Contact mchang402@cs.com

TAX PROFESSIONAL WANTED

Fremont Business Services Firm seeking year-round degreed tax professional to join our firm. We are looking for a team player with over five years experience preparing individual, corporate, LLC and partnership tax returns. Experience in preparing fiduciary and nonprofit returns is helpful. Candidate must be experienced in QuickBooks and the use of tax software. Enrolled Agent or CPA preferred. E-mail resume to yvonnetbc@aol.com or Fax to 510-657-9503.

LEARN ABOUT THE NEW EA EXAM by Donna Miller EA

The Orange County chapter is hosting an enrolled agent review course. The teacher, Bill Geideman, has volunteered to take the EA test as soon as it is offered in order to get direct experience about the new exam. On Saturday October 14 at 8:30 a.m. he is holding a class to go over the new exam. The fee is $125. If you know anyone who is interested in learning about the new test and would like to attend this class please have them call Bill at (714) 669-0453. His e-mail: billstaxx@earthlink.net.
PRACTICE MANAGEMENT GROUP?
by Duncan Sandiland EA

Put any three EAs together, and pretty soon we’ll start talking about practice management and clients. Some of those conversations can be extremely informative, but there comes a time when talking just isn’t adequate. Over the last few months, a surprisingly large number of Chapter members have asked me if we could get together some sort of discussion group which could travel to different members’ offices to see how things worked there. That sounds like a grand idea.

Since most of my good ideas were originally learned from other people and then adapted to my own changing needs, I will volunteer to be the guinea pig in this project. We are looking for maybe a half-dozen members willing to have some Chapter members visit their office, conduct a tour and answer question about office procedures and related topics. I expect we’d visit one office per month or thereabouts until the end of this year, and each visit might take from one to three hours, depending on turnout and questions. Note that we can also discuss home offices if interest warrants.

All Chapter members are invited to participate, whether freshly minted, heavily experienced or somewhere in between. We might need to put a limit on how many can comfortably fit into some offices, so please respond early for best selection. Call me at (925) 691-1040 for more details.

2006 - 2007 Board of Directors and Committee Chairs
Web Page http://www.eastbayea.org

President: Bonnie Buhnerkempe EA, etc 925-855-0829
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2nd VP: Walter Nygaard EA, etc 510-547-0440
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Judi Gilmer EA 925-373-1468
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Public Affairs: Michael Barrick EA 510-339-7039

Social Affairs: Janet Bridges EA 510-538-0401
CSEA Directors: Thomas Johnston EA 925-828-4500
Walter Nygaard EA 510-547-0440

Education Committee, (1st VP)
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Inter-chapter Liaison: (vacant)
Tax Talk: Diane Jaworski-Faulhaber EA 510-538-0948
Program: Philip Fiegler EA 510-530-1174
Charleen Daefield EA 925-872-4075
Scholarship: Norm Madge EA 510-489-8713
Continuing Ed: Joanne Anderson EA 925-938-9086
Mini Seminar Team: (vacant)

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Audit: Dave Britton EA, etc 510-794-1040
Bylaws/SOP: Sal Romo EA 510-417-9492
Budget & Finance: Walt Thomas EA 510-725-8356
Chapter Off.: Bonnie Buhnerkempe EA 925-855-0829
Legislative Affairs: Lillian Lea EA 510-526-2220
Nominating: Kim Kastl EA 510-537-2122
Strategic Advisory: (vacant)
Bulletin: Eleanor Power EA 510-525-9987
TAX Agency Liaison:
LaRee Jensen-Graham EA 510-601-0409

EAST BAY ASSOCIATION OF ENROLLED AGENTS
POBox 23125
Pleasant Hill, CA  94523
(800) 617-1040
(925) 691-1866
fax (925) 465-7474
e-mail: ebaea@ebaea.org
CSEA East Bay Chapter
DISCOUNT CODE: Q521
Your association receives a donation for each product purchased under this special discount code—and you receive a discounted price on every product! Prices and donation amounts are listed on order form.

QUICKFINDER HANDBOOKS

1040 Quickfinder Handbook
The Original Quickfinder! Covers all aspects of preparing a 1040 return.
FREE— Personal Income Tax Organizer and Deduction Finder®!

Small Business Quickfinder Handbook
The first-stop resource for preparing tax returns for every type of small business—partnerships and corporations—plus estate, trusts and tax-exempt organizations. Forms 1065, 1120, 1120S, 1041, 706, 709, 990.

All States Quickfinder Handbook
Complete summary of each state’s part-year and nonresident instructions for individual tax returns, with over 500 pages of easy-to-find tabs—eliminates hours spent downloading out-of-state instructions online!

Accounting and Bookkeeping Quickfinder Handbook
Designed for tax professionals! Create the accounting records needed to prepare tax returns and conquer clients’ accounting challenges.

Depreciation Quickfinder Handbook
The only guide you need to deal with depreciation—quick answers to all your depreciation and business property questions. If you have business clients, we’ll save you time and headaches!

Tax Planning for Businesses Quickfinder Handbook
Stay up to speed on new business tax saving strategies and leverage changing tax rules to your clients’ advantage with this new Handbook! Tax planning tips will save tax dollars at every stage of a business operation.

Tax Planning for Individuals Quickfinder Handbook
Income, estate and gift tax planning for individuals, with strategies to reduce individual clients’ federal tax burdens. Tables, charts, examples, 1040 Tax Planning Roadmap!

OTHER QUICKFINDER PRODUCTS

Package QF-X for Individual Returns
Package QF-X for Business Returns
More than 300 pages each of logically organized IRS forms and instructions, spiral bound for easy copying. Tabs are also provided for ease of use.

Quickfinder Tax Tips Newsletter
A monthly newsletter full of fast, accurate tax and financial planning information. Includes briefings of important tax developments, practice management tips, and Q&As based on actual customer questions.

Tax Tables for Individuals
Tax Tables for Businesses
Durable, laminated fold-out tools with the Quickfinder tables and charts you use most often, right at your fingertips!

For complete description of each product, including a tab-by-tab listing of Handbook contents, please visit: Quickfinder.com

QUICKFINDER SELF-STUDY CPE COURSES

Handbook-Based CPE
Meet your CPE and training requirements based on the Quickfinder Handbooks you own and use every day—and now all Handbooks have a related self-study CPE course available! Each course qualifies for 8 hours of CPE. Related Handbook is an integral part of course material.

Standalone CPE

Ethics and Responsibilities of Tax Professionals (DERT)
2 hours CPE
Addresses amended IRS Circular 230 regulations on written tax advice—including email! Meets the 2-hour ethics course requirement for EAs!
(CPAs, please consult your state’s requirements to determine if it course qualifies in your state.)

Tax Practice Management (DMAT)
12 hours CPE
Learn proven best practices to operate, expand and market a successful tax practice. An essential course for independent tax business owners who want to open a new tax office or expand an existing one. Learn proven strategies and tactics to attract new clients and retain existing clients.

Income Tax Training Courses
30 hours CPE each
• Basic Income Tax Preparation for Individuals (DBIT)
• Comprehensive Income Tax Preparation for Individuals (DCIT)
• How to Prepare Small Business Income Tax Returns (DBTT)

For more CPE information, including complete course descriptions, learning objectives, and NASBA disclosure, call 800-510-8997 or visit: Quickfinder.com/cpe.

ORDER INSTRUCTIONS

• Orders must be received by Dec. 1, 2006 to receive group pricing.
• Payment must be included.
• Make checks payable to Quickfinder.

Mail or fax orders to:
Quickfinder
c/o EBAEA
11828 Dublin Blvd. Ste P
Dublin, CA 94568-2830
(925) 736-3853 Fax
CSEA East Bay Chapter
DISCOUNT CODE: Q521
Use your association code to receive the discount price and earn donations for your association!

Society .......................................................... (Must enter to receive discount and qualify for donation.)

Society Code .................................................... (if known.)

Customer Number .................................................. (if known.)

Company Name ................................................................

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Address ...........................................................................(If P.O. Box, please include physical address for UPS.)

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Month Year Cardholder’s Signature

CC Payments—Please Note: Our policy is to Charge your credit card at the time of order.

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NEW! Increased Donation Amount
Every Quickfinder purchase you make earns money for your association! See donation amounts listed below!

Orders must be faxed to (925) 736-3853 or mailed to:

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SOCIETY DISCOUNT CODE
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We are placing one group order in order to benefit from the best price.

All orders must be received by Dec. 1, 2006. Payment must be included. Make checks payable to Quickfinder.

Questions about ordering? Call us toll-free at 800-510-8997!
Do the Code, Regulations, Rulings, Policies and Procedures seem taxing and cryptic at times?
Let IRS Subject Matter Experts clarify issues and hot topics of importance to you and your tax practice.

Get the latest including:
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Radisson Hotel Stockton
2323 Grand Canal Blvd., Stockton CA 95207
Hwy. I-5 at March Lane
(209) 957-9090
Thursday, September 21, 2006
8:30 a.m. – 4:30 p.m.
Registration begins at 7:30 a.m.

REGISTRATION FORM

Please complete a separate form for each participant.

Name: ____________________________________________________________
Company: __________________________________________________________
Address: __________________________________________________________
City: __________________ State: ______ Zip Code: _____________
Phone: (________) ___________ Fax*: (________) ___________
Email Address*: ____________________________________________________
* Fax # or Email Address is required for registration confirmation.

How did you hear about the event? __________________________________________
Member of which CSEA, CPA, Attorney, Prof. Tax Related Chapter?

For CPE Credits please provide the following:
EA# __________________ CPA# __________________
CTEC# __________________ Other __________________

Payment: (Includes Continental Breakfast, Lunch & Refreshments)
   Early Bird $125 ☐       After Aug 31, 2006 $150 ☐
Form of Payment:   Check ☐ (Payable to: “Big Valley CSEA”)
Visa ☐ MasterCard ☐ American Express ☐
Acct # __________________ Exp. Date ____________

Name as appears on card: _____________________________________________

SIGNATURE _______________________________________________________

Mail completed Registration Form and Form of Payment to:
Big Valley Chapter CSEA
c/o Connie Ferrell, EA
P.O. Box 850
Soulsbyville, CA 95372-0850

... or if Paying by Credit Card Fax to: (209) 532-5209

Registration Questions?
Phone (209) 532-4053 Ext. 0
Email tax@flavinea.com

Cancellation Policy:
FULL refund, call by August 31, 2006.
PARTIAL refund (less $50), call by September 18, 2006.

Special Hotel Rates:
Call hotel, ask for In-House Reservations:
“T Hall”
Event Rate (thru September 6th) $99