Mr. Acuña has taught a variety of tax and financial professionals throughout the United States of America, including: California Society of Enrolled Agents, California Society of Tax Consultants, American Institute of Certified Public Accountants, National Tax Practice Institute, Best in the West (NSEA).

He was named 2009-2010 Booster of the Year by the California Society of Enrolled Agents and is a regular teacher at CSEA’s Super Seminar. He will be teaching a comprehensive estate planning overview on the 2011 Tax Boat. Mr. Acuña was admitted to the State Bar of California during 1985 and the State Bar of New York during 1987.

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ALL EAs MUST REGISTER PTIN
by Tom Johnston, EA
PTIN REGISTRATION IS LIVE!!! Go to http://www.irs.gov/taxpros/article/0,,id=210909,00.html to create an account, then apply using the account you just created. If your CAF is 9 digits, leave that field blank or your application will bounce. You should get your old PTIN back in as little as 15 minutes. See last month’s Bulletin for more details on registration, or the flyer in this issue for an IRS webinar later this month.

NEW REV PROC FOR REIMBURSEMENTS
Revenue Procedure 2010-39 provides rules for employees who are reimbursed for lodging, meals, and incidental expenses, or meals and incidental expenses only, while traveling away from home, to substantiate the expenses by per diem allowance rather than actual expenses. The revenue procedure also provides an optional method for employees and self-employed individuals who are not reimbursed to use in computing the deductible costs they pay or incur for business meal and incidental expenses, or for incidental expenses only if they pay or incur no meal expenses, while traveling away from home. Use of a method described in this revenue procedure is not mandatory, and a taxpayer may use actual allowable expenses if the taxpayer maintains adequate records or other proper substantiation.
PRESIDENT'S MESSAGE

by Tom Johnston, EA

When the news came that Lillian Lea, EA had passed on I felt a sense of personal loss. But as her friends spoke up about her accomplishments and the joy they felt from her friendship, I rejoiced with them for her life and the knowledge that she is now in a place of peace and love.

Lil was an only child raised in New Jersey and Virginia. She secured an athletic scholarship at Duke University, majoring in accounting. While there she was a NCAA championship golfer and engaged in civil rights activities. In later years she enjoyed Berkeley politics and counted as friends and clients a number of local political figures.

Lil joined EBAA in the early 80’s and served as a member of the Board of Directors and President (2003-2004). Her passion was tax legislation so she worked repeatedly as CSEA Director and was on the CSEA Legislation Committee for over a decade. She left a huge footprint on tax legislation locally and nationally.

Lil was involved in the financial statement "safe harbor” language agreement with the CPA lobby; in helping introduce and write legislation for federal disaster relief after the Oakland hills fire; in writing with Kathleen Wright the legislation for CA pension conformity; in setting up CSEA’s FEMA disaster site assistance program; and the list goes on.

Lil was very knowledgeable and accessible; truly an expert Enrolled Agent. CSEA honored her in 1995-96 as Enrolled Agent of the Year and in 2006-07 with the Distinguished Service Award.

What I remember most is how Lil warmed up a room when she came in and in her quietly elegant way took charge and made me feel all was OK. Lil truly....

Stood as a beacon on the East Bay Hills.

DO YOU LIKE OUR DINNER RAFFLE?

by Peggy Hall, EA

Isn’t it a neat way of having a bit of fun before we settle down to the evening’s education? Don’t our raffle people come up with some interesting items and themes? Would you like to see it continue?

Then you need to contact me, because the position is now vacant and this fun part of our Association will fade away unless you stick up for it. Get a couple friends and you can do it each month as a team project. What an excuse to get together and go shopping!

THANK GOODNESS IT’S OVER!

by Andy Rogers, EA

We will have a “Thank Goodness Its Over Party II” on Saturday October 16, 3-6 pm at Andy's house: 3333 Fernside Dr, Alameda. Kindly RSVP to Andy at 510-522-2300.

CONGRESSIONAL REPORT

by Cherry Comstock, EA

As part of my involvement with NAEA PAC, I was delighted to be able to attend a dinner reception for Representative Wally Herger, 2nd District on Saturday Sept 25. Wally is the second most senior Republican on the House Ways and Means Committee. NAEA supports Representative Herger and he is supportive and knowledgeable of Enrolled Agents.

The event was in a backyard setting, very relaxed and conducive to getting to know the person next to you. The event hosts, Bud and Christine Keeney, were friendly and gracious. Their grown children were in attendance and very supportive of their parents. The grounds were breathtaking. Mrs. Keeney is an amazing landscaper.

Representative Herger made a point of visiting with all present and seemed genuinely interested in feedback from his supporters. He made a brief speech that greatly encouraged me. He led off with the fact that the American public deserves a tax system that will allow them to plan for the future, mentioning that currently our taxpayers are at the whim of legislators and decisions come WAY too late for taxpayers to plan. Given that this was a major push on NAEA Fly In day, it made me feel some satisfaction.

There were many discussions. Representative Herger is not at all pleased with the Health Care Reform Act and would like it repealed in its entirety. He does have a plan to insure Americans have access to affordable health care without the problems he sees involved in this legislation.

Many of those attending are affected by environmentalists. You could tell these people were very concerned about preserving our land for future generations, but frustrated at the regulations that stop them from operating their businesses in a productive and profitable manner. Herger is also concerned with the environment, but wants sensible regulations that work with business rather than discourage business.

Representative Herger seemed fairly certain the 1099 reporting requirements would eventually be repealed. He did encourage all of us to let government know our opinions, but said something to the effect of "how could anyone comply with those requirements?"

He spoke about our "lame duck” session that would take place this year, and reminded me how important each of us is in the process of government of our country. It reenergized my enthusiasm for my personal responsibility to let my clients know what government is doing regarding taxation. Not influence, inform. NAEA (and CSEA) keeps us apprised of and even influences tax centered legislation. Wow, to be someone afforded a "face-to-face," I’m humbled by the opportunity. It was refreshing to witness this politician and all in attendance discussing issues from so many different perspectives.
**QUICKFINDERS**
*By Diann Gross, EA*

Attached to this newsletter is the special EBAEA group discounted 2010 Quickfinder order form. Please note that this special pricing is only available if sent through me as a group order using this form. All books will be delivered directly to you. The deadline for all orders is 12/1/2010. I urge you to FAX your orders early using the special code: Q521 on the new Quickfinder order form attached to this newsletter. Questions, call me at (925) 736-3853 Voice/Fax.

**TAXTALK 2010 - MARK YOUR CALENDAR**
*By Patty Pringle, EA*

This year’s Tax Talk Seminar will be held at the Holiday Inn Dublin (formerly the Radisson Hotel). Be sure to mark your calendar for November 3rd, 4th, and 5th. You don’t have to travel far to get your CPE requirements. We have negotiated special pricing with the Holiday Inn if you plan on staying overnight.

Best Education Bargain in the Bay Area. In this day of economic uncertainty we are all looking for ways to save money. As tax professionals we need to maintain our CPE and are seeking ways to get more value out of our education dollar. EBAEA realizes this and our Tax Talk 2010 Seminar will provide 24 hours of CPE at the lowest possible cost. Continental breakfast, lunch and snacks will be provided.

Once again we have lined up well known speakers to present topics that are current and valuable to all tax professionals. Our speakers: Karen Brosi, Claudia Hill, Robert McKenzie, Vicki Mulak, Jennifer MacMillan and Michelle Jurasik from IRS. Topics include the all important Federal and State Updates, Audit Reconsideration and Updates, Ethics (required), Mortgage Interest, AMT, Business Debt Relief & COD including rental property, business property and investment property just to mention a few.

On Wednesday, November 3rd our “Tax Talk After Hours” will feature Steve Sims the FTB Taxpayer Advocate.

We are always looking for volunteers to help with the seminar and if you are interested please contact me at eupattypringle@sbcglobal.net or 510-912-1682. See the last section of this bulletin for additional details and pricing.

**NEW OAKLAND BREAKFAST GROUP**

After an extended hiatus, Andy Rogers and Ann Opara announce the resumption of the monthly small group meeting in the Oakland area. They are held on the second Tuesday of each month at the Buttercup Grille in Jack London Square on Broadway near 3rd. For more details, contact Andy at (510) 522-2300 or email Andy@TaxBuddha.com.

**CHANGE IN IRS STAFF**

Effective October 1, Gerry Kelly-Brenner has moved to a new position. Our new Senior Stakeholder Liaison is Vivienne Antal. Her phone is (510) 637-1902 and her email is Vivienne.antal@irs.gov. Gerry, thanks for all the wonderful help!

**EBAEA EMAIL LISTS**

EBAEA sends news to Members via two one-way (send-only) email distribution lists. Subscription is free and completely voluntary, and you can subscribe or unsubscribe to either list any time you wish. For more information and to manage your subscription, visit: http://ebaea.org/cgi-bin/dada/mail.cgi

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<thead>
<tr>
<th><strong>Small Group Tax Meetings</strong></th>
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<tr>
<td><strong>Antioch / Brentwood</strong></td>
<td>Fridays 8:00am</td>
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<tr>
<td>Brentwood Cafe, 8500 Brentwood Blvd, Brentwood</td>
<td>(925) 634-8297</td>
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<tr>
<td>Ken Seamann EA</td>
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<tr>
<td><strong>Danville Area</strong></td>
<td>4th Tue 9:30am</td>
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<tr>
<td>Pascals French Oven, 155 Railroad Ave, Danville</td>
<td>(510) 366-8836</td>
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<tr>
<td>Michael Power EA</td>
<td></td>
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<tr>
<td><strong>Oakland Area (Near BART)</strong></td>
<td>2nd Tue 9:00am</td>
</tr>
<tr>
<td>Buttercup Cafe, 229 Broadway, Oakland</td>
<td>(510) 522-2300</td>
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<tr>
<td>Andy Rogers EA</td>
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<tr>
<td><strong>Livermore Area</strong></td>
<td>Fridays 8:45am</td>
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<tr>
<td>Rock House Cafe on Portola Ave, Livermore</td>
<td>(925) 606-6672</td>
</tr>
<tr>
<td>Richard Goudreau EA</td>
<td></td>
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<tr>
<td><strong>Castro Valley</strong></td>
<td>3rd Tue 8:00am</td>
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<tr>
<td>Carrow's, 2723 Castro Valley Blvd @ Lake Chabot, CV</td>
<td>(510) 537-3883</td>
</tr>
<tr>
<td>Dagmar Bedard EA</td>
<td></td>
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<tr>
<td><strong>South Alameda County</strong></td>
<td>1st Wed 9:30am</td>
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<tr>
<td>Dino's, 1 block W of I-880 on Industrial Blvd, Hayward</td>
<td>(510) 487-1691</td>
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<tr>
<td>Sal Romo EA or Walt Thomas EA</td>
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<tr>
<td><strong>Email-only Group</strong></td>
<td>as needed</td>
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<tr>
<td>Send an email to <a href="mailto:halloftaxes@hotmail.com">halloftaxes@hotmail.com</a></td>
<td></td>
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<tr>
<td>Peggy Hall EA</td>
<td>(925) 388-1040</td>
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**SPEAKER DEVELOPMENT**
*By Andy Rogers, EA*

The next Speakers Development meeting will be at Mark Bole's house: 3264 Rogers Ave, Walnut Creek, 94597 on Friday October 22, 5 - 7 pm. We will order pizza and beverages for dinner and expect it will be about $10 each, if you want to eat. No charge for the meeting, and we will begin promptly and end on time.

This group meets to encourage the development of speakers specifically in regard to taxes and is a function of Public Information and Awareness.

Please call or email Andy Rogers at (510) 522-2300 with any questions or ideas. ALL are welcome!
HELP WANTED: EA FOR TAX SEASON
Established Hayward tax office seeks EA with minimum of 5 years current experience. Contemporary, pleasant office environment. Responsibilities include preparation of simple to complex tax returns for individuals and small businesses. Must be computer literate, 2 yrs + experience using Lacerte, Excel, Word; assemble returns for signature, use of work papers & documentation management. Must have good communication skills and an eye for detail. Please fax or e-mail your resume including a cover letter and salary requirements to:
Kim Kastl, EA
Secure Taxes, Incorporated
FAX: (510) 537-9331
kkastl@yoursecuretaxes.com

BULLETIN ADVERTISING POLICY
by Duncan Sandiland, Bulletin Editor
To encourage more Members to use the Bulletin to fill their needs, we present the Bulletin advertising policy:
1) All Bulletin notices are run for a maximum of three months. If you wish to run a notice for a longer period, you must resubmit it.
2) Maximum notice size is 1.5 column inches. This equals a space one and one-half inches high by one column (3.5 inches) wide. The standard Bulletin font is Times New Roman 11 point.
3) The Bulletin Editor reserves the right to edit any notice for style, content and length.
4) All notices must be submitted (and payment received) by the 25th of the month prior to initial publication. Send the desired text to: bulletin@ebaea.org
5) Member notices seeking or offering employment, clients or EA-practice-related matters are run at no charge as a Member benefit. This includes an ad run by a firm which employs a Member. Member notices offering other services or products, and all non-Member notices are run at the standard fee of $150 for the three-month insertion. The Bulletin Editor reserves the right to modify or reject any notice which, in the sole opinion of the Editor, violates any of the principles of EBAEA.

CALENDAR OF EVENTS

**October 2010**

20 EBAEA Dinner Meeting: “2010 Carryover Basis”
@ Holiday Inn, Regional St, Dublin

22 Speaker Development meeting
@ Mark Bole’s house, 3264 Rodgers Ave, WC

**November 2010**

3, 4, 5 TaxTalk seminar
@ Holiday Inn, Regional St, Dublin

December 2010

15 EBAEA Dinner Meeting: “Ethics”
@ Holiday Inn, Hegenberger Rd, Oakland

HUMOR
An old Italian lived alone in New Jersey. He wanted to plant his annual tomato garden, but it was very difficult work, as the ground was hard. His only son, Vincent, who used to help him, was in prison. The old man wrote a letter to his son and described his predicament:

Dear Vincent,
I am feeling pretty sad because it looks like I won’t be able to plant my tomato garden this year. I’m just getting too old to be digging up a garden plot. I know if you were here my troubles would be over. I know you would be happy to dig the plot for me, like in the old days.
Love, Papa

A few days later he received a letter from his son:

Dear Papa,
Don’t dig up that garden. That’s where the bodies are buried.
Love, Vinnie

At 4 a.m. the next morning, FBI agents and local police arrived and dug up the entire area without finding any bodies. They apologized to the old man and left. That same day the old man received another letter from his son:

Dear Papa,
Go ahead and plant the tomatoes now. That’s the best I could do under the circumstances.
Love you, Vinnie

HMMMMM...

When Medicare was signed into law by President Johnson in 1965 (former President Harry Truman was the #1 enrollee into Medicare), the projected annual cost of Medicare in 1990 (i.e., 25 years in the future) was $12 billion. The actual cost of Medicare was $13 billion just 10 years later (1975) and was $98 billion in 1990, more than 8 times as large as the original 1965 forecast. (OMB)
The US government paid $1 billion of interest expense on its Treasury debt every 40 hours during the month of February 2010. (Treasury)

Revolving credit, including credit card debt, fell in July 2010 for the 23rd consecutive monthly decline. The nationwide total of revolving credit has fallen 15% from its August 2008 peak. (Federal Reserve) The US government has spent more than it takes in as tax receipts for 23 consecutive months, since September 2008. (Treasury) Ed. Note: the huge decrease in consumer debt was more than offset by the monstrous increase in US government debt – so much for “the best and the brightest”.

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**2010 - 2011 Board of Directors and Committee Chairs**

President: Thomas Johnston EA 925-828-4500
1st VP: Patty Pringle EA 510-912-1682
2nd VP: Andy Rogers EA 510-522-2300
Treasurer: Marjorie Williams-Jones EA 510-482-6204
Secretary: Linda Koziol EA 925-449-1204
Immed Past Pres: Peggy Hall EA 925-388-1040
Director 2010-2011:
- Margie Hines EA 510-247-9423
- Gail Nanbu EA 925-943-3993
- Andy Rogers EA 510-522-2300
Director 2010-2012:
- Eva Konigsberg EA 510-928-5067
- Morris Miyabara EA 650-867-4507
- Irene Moore EA 510-791-8962x16
CSEA Director: Patty Pringle EA 925-912-1682

**Communication Committee, (1st VP)**

Chair: Andy Rogers EA 510-522-2300
Bulletin: Duncan Sandiland EA, etc 800-617-1040
Disaster Services: Janet Bridges EA 510-505-0818
Legislative: Morris Miyabara EA 650-867-4507
Membership: Peggy Hall EA 925-388-1040
Membership: Gail Nanbu EA 925-943-3993
Practice Preservation: Linda Fox EA 925-846-5913
PIA: Eva Konigsberg EA 510-928-5067
Quickfinders: Diann Gross EA 925-736-3853

**Social Affairs:**

Website: Eric Rheinheimer EA 510-893-3601
IRS Practitioner Panel: Phil Fiegler EA 510-530-1174
CTEC Panel: Walt Thomas EA 510-487-1691

**Education Committee, (2nd VP)**

Chair: Patty Pringle EA 510-912-1682
Continuing Ed: Joanne Anderson EA 925-938-9086
Mini Seminar Team: Andy Rogers EA 510-522-2300
Program: Irene Moore EA 510-791-8962x16
Program: Bob Olsen EA 925-837-8329
SEE Class: Thomas Johnston EA 925-828-4500
Tax Talk: Patty Pringle EA 510-912-1682
Tax Talk: Bonnie Buhnerkempe EA, etc 925-855-0829
Town Hall: Linda Koziol EA 925-449-1204
VITA Team: Brian Pon EA, etc 510-849-4667

**Administration Committee (IPP)**

Chair: Peggy Hall EA 925-388-1040
Bylaws/SOP: Sal Romo EA 510-471-9492
Budget & Finance: Walt Thomas EA 510-725-8356
Chapter Office: Dagmar Bednarek EA 510-537-3863
Nominating: Peggy Hall EA 925-388-1040
Volunteer Coordinator: Patty Pringle EA 510-912-1682

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**EAST BAY ASSOCIATION OF ENROLLED AGENTS**

30100 Mission Blvd, Suite 6, Hayward CA 94544
(800) 617-1040 or (510) 487-2063  fax (510) 487-1501  email: ebaea@ebaea.org
Frank Acuña has merged his law practice and moved his office.
(Please update your records with his new contact info)

Come see the new digs, drink his wine and eat his food!

Kimball, Tirey & St. John LLP
would like to cordially invite you to our
Open House
October 21, 2010
4pm-7pm
500 Ygnacio Valley Road, Suite #290
Walnut Creek, CA 94596

The Law Offices of
Kimball, Tirey & St. John LLP
is pleased to announce the merger of
Kimball, Tirey & St. John LLP with Acuña & Casas, P.C.

Acuña & Casas P.C. is operating as the Northern California Business and Real Estate Group. We will continue to offer expertise in estate planning, probate and trust administration, private fiduciary representation, inheritance contest litigation, business and real estate formation, transactions, capitalization, private placement offerings and business and real estate law. The merged firm will allow us to meet the expanding needs of our Northern California clients.

Kimball, Tirey & St. John LLP will continue to represent clients in unlawful detainer, debt collection, civil litigation, employment law, fair housing, and ADA defense matters throughout California.

Our new office is located at:
Kimball, Tirey & St. John LLP
Northern California Business and Real Estate Group
Frank R. Acuña, Managing Partner
500 Ygnacio Valley Road, Suite #290
Walnut Creek, CA 94596
(925) 906-1880 telephone
(866) 906-1880 toll free
(925) 937-5634 facsimile
Frank.acuna@kts-law.com

Puneet Singh, Managing Partner
Landlord Tenant Division
(925) 469-1690 telephone
(800) 525-1690 toll free
Puneet.Singh@kts-law.com
www.kts-law.com
2010 SPECIAL ENROLLMENT EXAM PREPARATION CLASSES

Presented By
EAST BAY ASSOCIATION OF ENROLLED AGENTS

**Note Dates Changed**

Part 3 -- Representation  Dates: Oct 23, 30  CPE 12 hrs*

* You must attend all 6 hours per day for credit  See next page for CPE

Time: Saturdays 9:00 AM to 4:00 PM (Lunch is on your own)

Location: Holiday Inn Hotel (Radisson), 6680 Regional St, Dublin CA 94568

Instructors: Pat Golden, EA; Peter Lingane, EA; Andy Rogers, EA; and Bart Rugo, EA

Prerequisite: Basic knowledge in tax preparation of Form 1040

Class Fees:
Part 3 $150

Text Books are not included and must be ordered directly from publisher

Register online at: www.123signup.com/calendar?Org=ebaea

Information: Tom Johnston at 925-828-4500 or taxtomea@comcast.net

Scholarships: See CSEA and NAEA Websites for information.

To apply for Enrollment: www.irs.gov/taxpros/agents

To schedule exam: www.prometric.com/irs
SPECIAL ENROLLMENT EXAM
PREPARATION CLASSES

CPE INFORMATION

* Partial credit is not given. You must attend all hours per part to receive credit.

CTEC
All classes qualify for CTEC Federal Tax credit in the fiscal year of the final class per Part. Hence, Parts 1, 2, & 3 classes qualify for the current fiscal year which ends October 31st.

IRS Circular 230
If you were not an EA, CPA or Attorney when you take the classes, if you also take the Special Enrollment Exam and become an EA, you can count the classes as part of the IRS CPE requirement. However, the classes may not be used as part of the 16 hours minimum requirement in the final year of the three year enrollment cycle. The IRS currently calculates continuing education received in a calendar year (Jan 1 to Dec 31).

If you are already an EA, CPA or Attorney when you take the classes, the classes do not qualify for IRS CPE because the classes are considered basic courses on subjects with which you should already be familiar. However, the classes will qualify for the additional CPE requirement for members of CSEA and NAEA.

IRS Circular 230 Rules for renewed enrollment effective after April 1, 2007:
Your renewal cycle is assigned according to the last digit of your social security number. See IRS website for specific information on renewal cycle.

You must complete 72 CPE credit hours over the three year period specified. Each year you must have a minimum of 16 CPE credit hours of which 2 hours must be in Ethics.

An individual who receives initial enrollment during an enrollment cycle must complete two (2) hours of qualifying continuing education credit for each month enrolled during the enrollment cycle. Enrollment for any part of a month is considered enrollment for the entire month.

References:
Circular 230 Sec 10.6(e)
www.irs.gov/taxpros Enrolled Agents CPE

Members of CSEA & NAEA:
Including the IRS requirements above you must complete a total of 90 (IRS 72 + 18) CPE credit hours over a three year cycle or 30 (IRS 24 + 6) CPE credit hours per year.
New members are pro-rated CPE through the first year 2 hours CPE per month.
SEE CLASS INSTRUCTOR BIOGRAPHIES

Pat Golden, EA, MBA Tax  Trained as a Psychiatric Technician in the Navy. For a number of years he was a community mental health worker in San Francisco (Haight, Fillmore, Western Addition). Because of his Crisis Clinic work he was hired by IRS for office audits. Mr. Golden has a BA from the University of California Berkeley and MBA Tax from Golden Gate University. Pat worked in CPA firms for several years. He has been a sole practitioner since 1983 preparing 400 returns a year, specializing in business returns.

Thomas W Johnston, EA began preparing tax returns in 1983 at the urging of a friend. He was accepted into practice as an Enrolled Agent in 1986. Mr. Johnston is Chairman of the SEE Class Committee and a Past President of EBAEA. He also serves as a member of the Ethics and Professional Conduct Committee for CSEA. Mr. Johnston is a graduate of San Francisco State University with BA and MA degrees in Drama. He taught for a number of years at the college level. He has also had a career as a building manager. Mr. Johnston has taken courses in the Master of Tax program at Golden Gate University and is a Fellow of the National Tax Practice Institute. Mr. Johnston's tax practice is in San Ramon where he specializes in tax returns for individuals, estates and trusts and does representation for his clients.

Peter James Lingane, EA, CFP®, PhD has a practice in Lafayette specializing in planning and compliance for mature individuals, trusts and estates. He has volunteered with low income assistance programs since 1994. In addition to being a VITA instructor, Peter was a SEE class instructor for East Bay previously. Peter is a graduate of Harvard University, has a PhD in chemistry from the California Institute of Technology, and is a Fellow of NTPI. Peter taught on the college level for several years prior to entering a career in industry. He is a published author and is a technical reviewer for the Journal of Financial Planning. Peter has served as a Director of EBAEA and NAEA and is a past editor of the chapter newsletter.

Sal Romo, Jr, EA is Past President of EBAEA and CSEA and is a member of CSEA's ByLaws Committee. Sal has taught VITA and SEE classes for a number of years. Sal is a recipient of the Distinguished Service Award of CSEA. A retired Coast Guard officer, Sal is now associated with AdTech Tax & Payroll in Hayward specializing in tax returns for Estates and Trusts.

Bart Rugo, EA retired from the IRS in 2007 after 30 years of service. He began as a Taxpayer Service Representative answering questions on the IRS toll free number and at several local offices. After gaining experience, Bart became an instructor of individual, military and small business taxes. Later he served as a Revenue Officer for 2 years after which he became the manager of the IRS Walk In office at the San Francisco federal building. During his last six years Bart worked with the IRS partnering with community organizations to train people to prepare basic tax returns in their local communities. Bart currently lives on Treasure Island where he enjoys the view and tries to enjoy the wind.
MARK YOUR CALENDAR

Tax Talk 2010
By Patty Pringle, Enrolled Agent

Best Education Bargain in the Bay
24 Hours of CPE Available
Don’t Delay Sign Up Today!!

You don’t need to travel far to get top quality education. This year the East Bay Association of Enrolled Agents Annual Fall Seminar “Tax Talk” will be held on November 3rd, 4th and 5th, at the Holiday Inn Hotel in Dublin (formerly the Radisson). Three days of continuing education and updates at an excellent value.

NAEA/CSEA Members

Full 3 day seminar only $499.00 if registration is postmarked before 10/16/10. $529.00 if postmarked after 10/15/10 for full 3 day seminar.
Any One Day-Wednesday, Thursday or Friday $199.00 if postmarked before 10/16/10. If postmarked after 10/15/10 $229.00 for any one day.

Non-Members

Full 3 day seminar only $529.00 if registration is postmarked before 10/16/10. $559.00 if postmarked after 10/15/2010.
Any One Day-Wednesday, Thursday or Friday $229.00 if postmarked before 10/16/10. If postmarked after 10/15/10 $259.00 for any one day.

Continental breakfast, hot lunch and afternoon snacks will be provided each day.

We have negotiated a Special Seminar Rate with the Holiday Inn (Dublin) of $79.00 per night if you register prior to October 9, 2010.

Wednesday
Robert McKenzie, Esq, EA,
  • Representation Update (2 hours)
  • Audit Reconsideration (2 hours)

Claudia Hill, EA, MBA
  • Federal Update (4 hours)

Steve Sims, FTB Taxpayer Advocate 5:30 to 7:00
  • After Hours “Questions and Answers”
  • Wine, Cheese and Soft Drinks will be served

Thursday
Vicki Mulak, EA, CFP
  • FTB and CA State Agency Update (4 hours)
  • Business Property Foreclosures, Debt Relief, Loan Remodifications. Rental property, business property and investment property (4 hours)
Friday

Michelle Jirasik, IRS Supervisory Revenue Agent
- IRS Audit Update (2 hours)

Jennifer MacMillan, EA, Past President of CSEA and member NAEA Government Relations Committee
- Ethics (2 hours required)

Karen Brosi, EA, CFP
- Mortgage Interest Including Tracing Rules (2 hours)
- AMT what’s up with that? (2 hours)

Register online at: www.123signup.com/calendar?org=ebaea
Or mail checks to: East Bay Association of Enrolled Agents
1290 B Street, Suite 118
Hayward, CA 94541

For additional information contact: Patty Pringle, EA
eapattypringle@sbcglobal.net or call 510-912-1682

VOLUNTEERS NEEDED – GET INVOLVED
We are looking for volunteers. If you would like to volunteer and lend a hand in any way your help is always needed and appreciated.
Please contact Patty Pringle eapattypringle@sbcglobal.net or 510-912-1682.
The CSEA Board of Directors Meeting was called to order by CSEA President, Kim Kastl, EA on September 25, 2010. President Kastl, asked that we observe a moment of silence and appreciation for the loss of our colleague Lillean Lea. Lillean was very active at CSEA and served on numerous committees and was also a past president of EBAEA. She will truly be missed.

Jean Nelson, EA and CSEA 1st Vice President took the lead on a Strategic Issues Discussion. The Board broke out into groups and discussed the results of two surveys that were sent to California Registered Tax Preparers (CRTP), one in February from CSEA Past President, David Shaw, EA and in one in September from current CSEA President, Kastl, EA. Included with each survey was a letter inviting them to join CSEA and the benefits of becoming a CSEA Professional Associate. The goal of our break out group was to discuss other ways we can encourage new membership.

The Board convened again on September 26, 2010. We continued the Strategic Issues Discussion. This time the break out group included members in attendance and past presidents. Even if you are not a member of the Board you can still participate in the decision making process.

The Legislative Affairs Committee made a recommendation to the Board regarding a letter pertaining to the proposed changes to Circular 230. CSEA President, Kastl assigned the Legislative Affairs Committee to form a Task Force and draft a letter to IRS Commissioner, Douglas Shulman expressing our concerns and suggestions to the proposed changes. The Board approved the draft and the final letter will be signed by CSEA President, Kastl and sent to Commissioner Shulman. Once the letter goes out all CSEA members will be notified with a copy and it will also be posted on the CSEA Website.

Other business before the Board included a recommendation from the CSEA Executive Committee regarding the correct usage of the new CSEA logo. During the design phase CSEA also developed a logo for each chapter bearing the CSEA logo and chapter name. Information on the CSEA Corporate Identity Graphic Standards and usage Guide will be available in the October issue of the CSEA Magazine and on the CSEA Website.

The Finance & Budget Committee brought a recommendation to the Board regarding increased membership dues. The Board was presented with a CSEA dues history and that there had not been a dues increase since 2007. The Board approved the slight dues increase which will be effective during the next renewal cycle. The increase will be posted on the CSEA Website.

The recruiting process continues in the search to find a new CSEA EVP. The Executive Committee will be interviewing candidates within the next few weeks.

The Board was very busy and other issues were discussed. I will continue this article in the November issue of the EBAEA Bulletin.
Tax Practitioner / IRS - Town Hall Meeting
By Tom Johnston, EA

Many topics were presented by eight presenters. Here are a few of the highlights:
Jennifer Henrie-Brown shared: Affordable Care Act - the IRS website link has summary information about the act. There is a small business health care tax credit for a firm size less than 25 and average annual wage below 50K. Health Coverage for older children to age 26 also applies to the self-employed. The IRS has requested input on their expanded information reporting requirements. There are incentives to hire previously unemployed workers of a payroll tax exemption and a new hire retention credit.

Treasury intends to eliminate FTD Coupons for tax deposits after 12/31/10. Pub 4169 and 966 should be helpful to those involved. Pub 4320 is a EFTPS Toolkit.

"IRS Live" is a bi-monthly panel discussion on various topics at 2 pm EST. e-news and Quick Alert subscriptions are available and you can sign up on the IRS webpage.

The Registered Tax Return Preparer program was explained and mandatory e-filing of federal returns after January 1, 2011.

Sharon Sword's presentation discussed the Examination Process from how returns are selected to how to appeal. Returns are selected if they have a high computer "DIF" score, the mismatching of W-2s and other documents with what is reported on the return, and when a particular item is treated differently when compared to similar taxpayers of a market segment.

The hot button topic is the IRS requesting Quick Books files from the client. Sharon mentioned that if a client closes out a year, then the file sent will only be for one year's records. Problems do show up then the tax payer does not have the underlying accounting knowledge they can get double income or expenses because the information is not put in correctly.

Compliance Priorities for the IRS are abusive tax avoidance transactions including trusts, a return preparer project, high income - high risk taxpayers, high income non-filers, unreported income, and employment tax noncompliance.

Form 14017 is fast track mediation which is one appeal option. Pub 3598 is a helpful resource for audit reconsideration, etc. Audit technical guides are accessible on the irs.gov website and instructional videos are at irsvideos.gov. Other pubs mentioned were 3498, 556, and 3114.

Brenda Voet talked about what's new in FTB audits. She mentioned the exchange of information between the FTB and IRS yields two special programs 1. under reported income CP2000 and 2. Revenue Agent Reports (RAR). When there is a tax increase for the IRS the taxpayer has six months to report to the FTB. To achieve matching the return with the information sent from the IRS the amended returns should be sent to:
RAR/VOL MS F310
Franchise Tax Board
PO Box 1998
Rancho Cordova, CA 95741-1998.

FTB Pub 1008 is on audits. At ftb.ca.gov you can get on the tax news e-mail list. The BOE and FTB have a reciprocal agreement to exchange information. Hot audit topics are: home mortgage interest, CA residents taxed on all income from all sources, like-kind exchanges when TP
moves out of state and then sells the exchanged property and does not send CA the tax due, abusive tax shelters, sales of principal residence, business credits, schedule D transactions, charitable trusts, specialized industry audits - entertainment industry, building and construction & independent contractors, as well as the annual programs: HOH, nonresidency, cancellation of debt, income from pass-through entities, losses on sale of property, casualty or disasters, bad debts, and nonfilers.

Jenine Robertson's topic was IRS Collection Actions. For levy or seizure action the appeal must be made within ten days to the field collection manager after the notice of seizure is provided. It was stressed that representatives should try to resolve the case as early in the process as possible, follow the appeal procedures outlined in the publications, and the taxpayer must be in full compliance during the resolution period. The following publications were recommended: 1660, 971, 4165, 4183.

Alan Keene presented the TIGTA presentation with videos which was very similar to a presentation at the chapter a year or so ago. Treasure Inspector General for Tax Administration officers are gun carrying officers that go after the bad guys. If you need to report someone you can call Oakland at: 510-637-2920.

Smitin Mehta from the EDD gave us a comprehensive tour of the EDD's website via PowerPoint. Their Taxpayer Assistance center number is 1-888-745-3886 and the website is very helpful and will get better in the near future at edd.ca.gov. EDD has expanded e-services.

2011 reporting changes: UI & DI taxable wages reported quarterly. New forms DE9 and DE9C. Obsolete are DE6 and DE7 for 2011.

Paul Griep from the State Board of Equalization talked about the registration of businesses and reporting use tax. They are getting quite aggressive in their efforts to bring businesses and individuals into compliance. There is a state voluntary program which limits the bite on taxpayers to three years from the possible ten years statute and allows the board to waive late filing and late payment penalties. The board also has a SCOPE program that goes door to door in business communities checking for licenses and educated businesses about their tax responsibilities. To contact the board: 800-400-7115.

All in all a lot of useful information was shared. Joe Calderaro was missed however.
CSEA State Agencies Liaison Meeting 2010
By Patty Pringle, EA

Another successful event sponsored by CSEA. This year the CSEA State Agencies Liaison Meeting was held on September 24th at the Holiday Inn Capitol Plaza in Sacramento. CSEA President, Kim Kastl, EA opened the event by introducing Tax Agency Liaison Committee (TALC) Chair Vicki Mulak, EA. Ms. Mulak lead us through the day of events.

Employment Development Department (EDD)
There were 5 guest speakers on the EDD Panel and 11 EDD members in the audience available to answer questions.

The major change is to quarterly payroll reporting. Employers will report their Unemployment Insurance, Employment Training Tax, and State Disability Insurance contributions, along with the Personal Income Tax withholdings, quarterly on the DE 9 instead of annually on the Annual Reconciliation Statement (DE 7). Detailed wage items for each worker will be reported on the DE 9C instead of the Quarterly Wage and Withholding Report (DE 6). Employers will still use the DE 6 and DE 7 for years prior to 2011.

Beginning in the spring of 2011, EDD will significantly expand its e-Services for Business. Employers will be able to conduct more business online with EDD including: viewing account information, filing reports and paying tax deposits and liabilities. The anticipated date is mid January for individuals and mid May for businesses.

For additional information visit the EDD Website at edd.ca.gov and click on Tax Professionals. They also offer classroom seminars which are available at various locations throughout California in addition to Web-Based Seminars that you can access online.

Board of Equalization (BOE)
Jim Kuhl, Business Taxes Representative spoke to the group about the Statewide Compliance Outreach Program (SCOP). SCOP focuses on identifying & registering business who are actively selling tangible personal property in California without a seller’s permit. There are 7 SCOP Teams throughout California and 8 canvassing specialists per team. At each visit, SCOP specialists identify themselves, check for a seller’s permit and other required fee permits and licenses, review information to verify accuracy with BOE records, review if business is reporting sales and use taxes properly, provide information and assistance and answer any questions. Before a selected zip code is visited by a team, letters are mailed to all registered business locations within that selected zip code 3-5 weeks prior to the SCOP visit. Cities, counties and local law enforcement agencies are contacted by our SCOP teams prior to their visit. In addition, a news release is sent out specifying the new zip codes to be visited after each mailing. To date 243,227 letters have been mailed to 258 zip codes and the last mailing was on 9/9/10. The program has proved to be very successful and since FY 09-09 thru August 31, 2010 total revenue is $86.7 million.

BOE continues to mail out notices that requires qualified purchasers to register with the BOE to report and pay their use tax on an annual basis.

Franchise Tax Board (FTB)
There were 13 guest speakers on the panel and 6 FTB members in the audience to answer questions. Among the guest speakers was Selvi Stanislaus, Executive Officer and Steve Sims, Taxpayers’ Rights Advocate.
Coming in 2010 – Access Your Account (will replace my FTB Account). It is anticipated that this new secure online system will be available on November 2, 2010. Tax professionals, taxpayers and businesses will be able to view estimated payments made, other payments made to FTB, current account balance, wage, withholding, and FTB-issued 1099 information. To use Access Your Account requires a one-time registration. In the registration process you choose your user name and password (you will no longer use a CSN). There will be a link available on the FTB Homepage. FTB Form 743 must be signed by the taxpayer and allows authorized access by an authorized representative. The taxpayer keeps the original of this form and gives a copy to the authorized representative. Do not mail the form to FTB but maintain the copy in your files.

The new “Virtual Hold System” allows a tax practitioner or taxpayer the choice for FTB to call the individual back rather than waiting on hold. All calls will be returned in the order they were received.

FTB is constantly improving and updating their forms and processes. The best way to stay current is to visit ftb.ca.gov and go to the Tax Professionals Page and click on Tax News. There is a wealth of information.

There were a lot of really good questions and answers. I wish it were possible to list them all. I suggest you come to next year’s meeting. Ask your questions and get them answered.

I was very impressed that so many speakers from the various taxing agencies took the time to come and speak to CSEA members. It was awesome!!
A brief summary of our CSEA Legislative Affairs Committee meeting on September 25
Gary Anspach, EA, Chair
2010-2011 CSEA Legislative Affairs Committee

- The Governor has not signed many bills with the deadline approaching this week. There is concern he may once again hold the legislature hostage to finalizing the State Budget before signing the bills sponsored by the legislators. SB 1244, sponsored by Senator Mimi Walters and guided by Vicki Mulak, EA, is unsigned at this point. Vicki will draft a letter to the Governor encouraging him to sign.

- The Circular 230 Task Force, chaired by Jennifer MacMillan, EA, provided the culmination of its work - a CSEA response to the proposed Circular 230 regulations - for the Committee's consideration. After some revisions, the document was approved to present to the Board of Directors.

- We heard reports from the District Leg visits continuing around the State. Despite difficulties scheduling meetings due to the budget impasse, our Members, recognizing the benefit of these visits, have been persistent in their efforts. San Gabriel Valley and Orange County Chapters have successfully completed numerous visits.

- The State Tax Agencies Liaison meeting in Friday was de-briefed. Unanimous opinion was that it was an exceptionally informative and valuable event. High kudos to Vicki Mulak, EA for her facilitation of the day.

- An update on Jim Stern Legislative Day scheduled for January 7, 2011 was provided by Cathy Apker and Xavier Martinez, EA. This promises to be another stellar day for CSEA.

- We approved 2011-2012 Action Plans and budgets

- We engaged in a strategic discussion describing the purpose of and identifying appropriate issues for the FTB Bill of Rights Hearing in December. Further discussion will take place in our November conference call meeting.

- The Chair appointed a Conformity Task Force which initially includes Vicki Mulak, EA and Gary Anspach, EA. Gina Rodriguez, EA will be asked to join. More on this will be available at the November conference call meeting.

- Articles scheduled to be submitted to the California Enrolled Agent by Committee members for the next issue (submissions due 10/1/10) include State Tax Agencies Liaison Meeting summary (Xavier Martinez, EA), Inter-relationship of PIA and Leg Committees (Jerry Satterberg, EA), Circular 230 Task Force process and report (Jennifer MacMillan, EA), District Leg visits and promotion of Jim Stern Leg Day (Gary Anspach, EA).
Internal Revenue Service Webinar

Demonstration of the IRS Tax Professional PTIN Sign-Up System

Presented by the Small Business/Self-Employed Division

Date: October 19, 2010

All federal tax return preparers must now register online using a new process. Learn how by viewing this free program.

This FREE webinar is for:

- Tax professionals

Learn about:

- The new process for obtaining a Preparer Tax Identification Number
- Information needed
- How to access the system
- Step-by-step instructions


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Trouble viewing:

- If you experience difficulty viewing the event, please use the e-mail option on the event page or call 866-956-4770. You will also receive helpful information when you register for the webinar.

Archive:

- The event will be archived on IRS.gov for later viewing approximately three weeks after the date of the event.

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