**NEXT MEETING** Wed, June 15, 2011

**Place:** OAKLAND AIRPORT HOLIDAY INN  

- **4:30** Board Meeting
- **6:15** Networking
- **6:45** Dinner Buffet
- **7:30** Program: “California Update”

**Cost:** $35.00 with reservation by Friday June 10  
$45.00 with reservation after deadline

Sign up online at:  
(please print out your confirmation to ensure that you clicked all the right buttons to register)  
Questions: email ebaea@ebaea.org (preferred) or call 800-617-1040.

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**June Topic: “Lynn Freer’s Mid-Year California Update”**

**Speaker:** Lynn Freer, EA  
*by Irene Moore, EA Program Chair*

Lynn Freer, EA – “Ms. California Tax – is President of Spidell Publishing. Freer works closely with all state tax agencies and is often consulted for input on policy decisions. She always has the inside information on what's happening at the state level because she devotes herself full time to analyzing, writing about, and teaching California tax law. She became an Enrolled Agent in 1976 and is a graduate of the University of California, San Diego.

Lynn’s presentations are constantly being updated as the winds of change blow through Sacramento. Among the projected subjects to be discussed are:

- Learn about new legislation, and what it means for California taxpayers;
- Find out what is happening with California conformity;
- Hear about FTB auditing COD;
- See what is new at EDD; and
- Discuss California's new use tax look-up tables

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**PRESIDENT’S MESSAGE**

*by Patty Pringle, EA*

It's all about you the MEMBERS. That is the mindset of your newly elected Officers and Board of Directors. The Executive Advisory Committee was born out of the idea that we get the past, present and future leaders of our chapter together to come up with a 3 year Strategic Plan. The outline of this plan will be presented at our retreat which is planned for June 11 (originally scheduled for June 18) at the Holiday Inn in Dublin. All members are welcome and encouraged to attend. We want to hear from you. While we agree that increasing our membership is important, it is even more important that we take care of our current members. If you plan on attending please contact the Chapter Office or email me at eapattypringle@sbcglobal.net so we can make accommodations. Light lunch will be served.

Margie Hines is our new Education Chair. Margie has been working with CSEA to make sure that our CPE reporting requirements are being maintained properly. Margie replaces Joanne Anderson who has done a fantastic job over the years. Joanne will still be at the signup desk for our monthly meetings. I am so amazed at how she remembers all our names. Thank you Joanne for all the years of dedicated service you have given to our chapter.

The 35th CSEA Annual Meeting will be held in Pasadena from June 20th thru June 24th. Events include the Jim Reed Memorial Golf Tournament, Bowling Tournament, General Session, Town Hall Meeting, Grand Banquet Celebration Dinner, and Rise and Shine Breakfast. In addition, several educational classes are also offered. You don’t have to attend all of the events - you can pick and choose. Go to csea.org for information and to register. Our chapter reimburses part of the cost for EBAEA members to attend. Last year many of our members were able to attend using our reimbursement.
program. Please contact me if you need additional information. Our Immediate Past President Tom Johnston submitted our chapter for CSEA Chapter of the Year. The winner will be announced at the Annual Meeting Grand Banquet Celebration Dinner. Our newly elected CSEA Director Andy Rogers will also be sworn in that night. Hope to see you there!!!

2010-11 EAST BAY CHAPTER REPORT
(submitted to CSEA)

Following the theme to “Stand as Beacons on the East Bay Hills,” the light from the officers and members of East Bay Chapter has extended from one coast to the other this year. New members have been welcomed with an excellent orientation and have increased attendance at monthly dinner meetings and the five small group meetings as well the e-mail group that helps with questions. The monthly newsletter has increased participation with timely articles. The fall tax seminar and mini-seminars have all been successful financially and have provided excellent CPE for the members and friends of the chapter. The success rate of those passing the SEE exam as a result of our SEE Prep class is impressive. Outreach to students at job fairs was expanded locally as well as out of state. The new Speaker Development program has resulted in opportunities to outreach to other organizations and provide them with speakers for meetings as well as promote the EA designation. This initiative is also developing skills and confidence of our own members to provide leadership within our chapter and beyond. The practice preservation group has provided council to retiring EAs and deceased EAs families. Our members have also been involved in training VITA program preparers and in instructing employers in the IRS/EDD program.

On a larger scale the East Bay member involvement in CSEA Leg Day was impressive as well as the many chairs of chapter committees that regularly attend and serve on CSEA committees. CSEA’s current president is a member of East Bay Chapter and East Bay’s current President is chair of CSEA’s E & PC Committee. Several members have contributed articles to CSEA publications and the chapter was honored with the cover and article in the September 2010 California Enrolled Agent. Two CSEA past presidents still serve actively at CSEA and one served as a member of the NAEA Board of Directors. One of our members is very active on NAEA’s PAC committee. The chapter has reached out to Big Valley Chapter to co-host CSEA’s 2013 Annual Meeting and continues to cooperate with other chapters in hosting the annual Town Hall Meeting. Our PIA outreach with other chapters using radio advertising this year has been very successful.

Respectfully Submitted,
Tom Johnston, EA – President

DINNER SUBSCRIPTIONS AVAILABLE

With the beginning of our new fiscal year, we are once again offering the popular dinner subscription. This plan grants you automatic reservation at all 11 Chapter dinner meetings for one locked-in price, so you are immune to any price increases due to different venues, additional CE offered, etc. You pay for nine regularly-priced meetings ($315) and get all eleven dinners (value $385).

This plan is only offered through our August meeting and takes your summer vacation into consideration. Enrolling before the July meeting assures you all eleven meetings for $315. Enrolling after the July meeting and before the August meeting assures you ten meetings for $315, which still gives you a free dinner.

To enroll, either 1) sign up online now or 2) use the enclosed form to send a check so the Chapter Office receives it at least a week before the meeting which starts your subscription or 3) sign up online as normal and bring a check for the remaining amount to the dinner meeting.

The Board of Directors requests that if you are not able to make a meeting, please contact the chapter office and cancel or say who is attending in your place. There are no refunds for dinners not used. If you have any questions, please call the Chapter Office at 1-800-617-1040 or email ebaea@ebaea.org

OUR WEBSITE – WHAT WOULD YOU DO?

The EBAEA website "steering committee" will meet after the Board Meeting ends, approximately 5:30 pm, June 15th, @ Holiday Inn, Hegenberger Road. If you want some input to the EBAEA website for the coming year, please attend, or send an email to AndyRogersEA@TaxBuddha.com with your ideas.

NEW BOARD ELECTED
by Duncan Sandiland, EA, NomCom Chair

At the EBAEA Annual Meeting on May 18, the following Members were elected to these offices for our 2011-2012 fiscal year:

President: Patty Pringle EA
1st Vice President: Andy Rogers EA
2nd Vice President: Gail Nanbu EA
Secretary: Linda Koziol, EA
Treasurer: Marjorie Williams-Jones EA
Director 2011-2013: Mark Bole EA
Director 2011-2013: Cherry Comstock EA
Director 2011-2013: Sal Romo EA
Director 2011-2012: Eva Konigsberg EA
Director 2011-2012: Morris Miyabara EA
Director 2011-2012: Irene Moore EA

Andy Rogers EA will be sworn in as our new CSEA Director at the CSEA Annual Meeting in Pasadena in late June.
**SAVE THE DATE** TaxTalk 2011  
*by Patty Pringle, EA, Seminar Chair*

Tax Talk 2011 will be held on November 2nd, 3rd and 4th at the Holiday Inn in Dublin. Once again we are providing quality education at an affordable price. We have lined up great speakers: Claudia Hill, Vicki Mulak, Twila Slesnick, Lisa Ihm, Jennifer MacMillan and Andy Rogers.

The outline of topics and early bird registration will be announced in the July Bulletin. Flyers will be mailed in late June.

**PIA – OUR NEW RADIO AD**  
*by Peggy Hall, EA*

If you haven’t yet heard this great piece on the radio, click on the link to the CSEA website and give it a listen: [http://www.csea.org/about-newsroom.asp](http://www.csea.org/about-newsroom.asp). And in case you want hard copy, here’s the script:

*When it comes to preparing your tax returns, how can you be sure that your tax preparer is fully qualified to help you receive all the deductions and credits available to you? One way to be sure is to have an Enrolled Agent prepare your returns.*

Members of the Bay Area Chapters of the California Society of Enrolled Agents are tax professionals, licensed by the federal government, and required to know all the latest tax law changes. We have the knowledge and expertise to sort through the tangled web of federal and state tax regulations. We are the experts who can help you create and implement an effective tax strategy for this year and for the future.

*When you don’t fully understand tax laws, you may pay too much or risk an audit. Don’t take that risk. Before trusting your tax returns to anyone, ask them if they are an Enrolled Agent.*

Find an Enrolled Agent in your area online at [csea.org](http://csea.org) or by calling 1-800-TAXPRO-5. That’s [csea.org](http://csea.org) or 1-800-TAXPRO-5. Enrolled Agents, The Tax Professionals.

**MEMBERSHIP UPDATE**  
*By Peggy Hall, EA*

While we did not “win” the Chapter Membership drive, we did win! We have 16 new members from the past few months. Welcome to those of you who are new! Please feel free to call any of the board members, or me Peggy Hall, 925 388-1040, if there is some way we can help you. We know we need to help each other, as many of us operate a solo practice. No questions are stupid questions.

On a wider front, the Board of Directors voted to purchase a “Booth in a Box.” This is a professional looking display to take when going out in the public to promote EAs. I have attached a picture of it so you can see how proud you will be when you take it to functions. So keep this in mind and help us find places to take it.

**THE DINNER RAFFLE IS BACK!**  
*by Dan “Terminator” France, CRTP*

The raffle has been revived with great enthusiasm. At the January 19 dinner meeting, with the support of my “intern” Bob Olsen, we quickly made the rounds before dinner started. Once all the ticket sales were added up, we collected $180; an excellent start to a program that has been sorely missed. As many of you may already know, the funds received from the raffle support the EBAEA Education Fund. Thanks to everyone for their contributions, large and small.

While this was my first time coordinating the raffle, the gifts were well received, and the winners got “Just what I always wanted.” If you have interest in supporting the raffle, and would like to make a donation, either cash or gifts, or if you have some ideas for good raffle prizes or themes, please contact me at (510) 299-2764 or at terminator@t3tax.com. This is a great way to support EBAEA.

**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) 332-0401 or email Andy@TaxBuddha.com.

**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](http://ebaea.org/cgi-bin/dada/mail.cgi)

**SPEAKER DEVELOPMENT**  
*By Andy Rogers, EA*

The next Speakers Development meeting will be on Saturday, July 30, at a top-secret resort location to be announced later. If you’d like to be on the mailing list, please send an email to Andy@TaxBuddha.com with “speaker development” in the subject line and ask to be added to the list.

This group meets to encourage the development of speakers specifically in regard to taxes and is a function of the Public Information and Awareness Committee. Please call or email Andy Rogers at (510) 332-0401 with any questions or ideas. ALL are welcome!
NEW GROUP – AUDIT REPRESENTATION

Announcing the new “Audit and Representation Group”. We’ll present an audit ‘case’ and discuss audit and representation in general. The next meeting is on Wednesday, June 8 from 9:30 til 11:30am at Millie’s Kitchen 1018 Oak Hill Rd, Lafayette. You may want to park in the Safeway parking lot and walk over. For more info contact Andy Rogers 510-332-0401 or better: Andy@TaxBuddha.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.

MEMBERS SPEAK

For EBAEA members to list speaking engagements next month, please email details to Andy@TaxBuddha.com

Andy Rogers will be presenting several topics at the CSEA Annual Meeting in Pasadena. For more information, please click on http://www.csea.org/events/2011-Annual-Meeting-EDUCATION-REG-FORM.pdf

CALENDAR OF EVENTS

June 2011

<table>
<thead>
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<tr>
<td>2-4</td>
<td>CSEA SuperSeminar @ Grand Sierra Resort, Reno</td>
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<tr>
<td>8</td>
<td>Audit &amp; Representation group meeting @ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette</td>
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<tr>
<td>11</td>
<td>EBAEA Annual Chapter Retreat (tentative) @ Holiday Inn, Dublin</td>
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<td>15</td>
<td>EBAEA Dinner Meeting: “CA Update” @ Holiday Inn, Hegenberger Rd, Oakland</td>
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<td>20-24</td>
<td>CSEA Annual Meeting/Board Meeting @ Hilton Pasadena</td>
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July 2011

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<th>Date</th>
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<tr>
<td>13</td>
<td>Audit &amp; Representation group meeting @ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette</td>
</tr>
<tr>
<td>20</td>
<td>EBAEA Dinner Meeting: “SS &amp; Medicare” @ Holiday Inn, Dublin</td>
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August 2011
3 Audit & Representation group meeting
@ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette
17 EBAEA Dinner Meeting: “Practice Management”
@ Holiday Inn, Dublin

September 2011
7 Audit & Representation group meeting
@ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette
19 Practitioner/IRS Town Hall
@ Emeryville
21 EBAEA Dinner Meeting: “Estate Asset Basis”
@ Holiday Inn, Hegenberger Rd, Oakland

HMMMMM...

The US government has been forced to shut down (due to Congressional stalemates over budgetary issues) 17 times in our nation’s history before the current 2011 impasse. (Congress)

The number of Americans that have been unemployed for at least 27 weeks is nearly 5 times larger today compared to 4 years ago. There were 1.2 million Americans that had been out of work for at least 27 weeks as of 4/30/07, compared to 5.8 million long-term unemployed Americans as of 4/30/11. (DOL)

BAD NEWS - Per a 5/13/11 report, the Medicare trust fund supporting Medicare Part A (hospital coverage) is projected to be depleted by 2024 or 13 years from now and 5 years earlier than what was projected just 1 year ago. Benefits to be paid out of Medicare are expected to exceed Medicare tax revenues in all future years. The long-term (75-year) present value shortfall in the trust fund however could be corrected by an immediate 0.79% increase in combined Medicare payroll taxes, i.e., from the current 2.90% to 3.69% (Medicare Trustees)

WORSE NEWS - Although the 2011 annual report from the Medicare Trustees indicated that its solvency is good through 2024, the chief actuary of Medicare noted on page 46 (of a 273 page document) that “the projections shown in this report for current law should not be interpreted as our best expectation of actual Medicare financial operations in the future but rather as illustrations of the very favorable impact of permanently slower growth in health care costs, if such slower growth can be achieved” (Medicare Trustees) (emphasis added)

OMG NEWS - Medicare enrollment is projected to rise from 49 million today to 81 million in 2030 (Medicare).

HUMOR

“Blessed are the young, for they shall inherit the national debt.” - Herbert Hoover

“I would suggest the taxation of all property equally whether church or corporation, exempting only the last resting place of the dead and possibly, with proper restrictions, church edifices.” - Ulysses S. Grant

“The best way for the Government to maintain its credit is to pay as it goes-not by resorting to loans, but by keeping out of debt-through an adequate income secured by a system of taxation, external or internal, or both.” - William McKinley

“Here is my principle: Taxes shall be levied according to ability to pay. That is the only American principle.”

“Here is my principle: Taxes shall be levied according to ability to pay. That is the only American principle.” -and- “In time of this grave national danger, when all excess income should go to win the war, no American citizen ought to have a net income, after he has paid his taxes, of more than $25,000 a year.” - Franklin D. Roosevelt

“Our federal tax system is, in short, utterly impossible, utterly unjust and completely counterproductive [it] reeks with injustice and is fundamentally un-American... it has earned a rebellion and it's time we rebelled”. - Ronald Reagan

After eight days of backpacking, my wife and I were looking pretty scruffy. She came to breakfast in a baseball cap, her hair sticking out at odd angles. She asked, “Does my hair make me look like a water buffalo?” I thought for a moment, then said, “If I tell you the truth, do you promise not to charge?”

Several recent Presidents are caught in a tornado, and off they spin to Oz. After threatening trials and tribulations, they finally make it to the Emerald City and come before the Great Wizard. “WHAT BRINGS YOU BEFORE THE GREAT WIZARD? WHAT DO YOU WANT?” Jimmy Carter steps forward timidly: “I had a terrible time with Iran, so I’ve come for some courage.” “No problem” says the Wizard, “WHO IS NEXT?” Ronald Reagan steps forward, “Well, well, well, I need a brain.” “Done”, says the Wizard. “Who comes next before the Great Wizard?” Up steps George Bush sadly, “I’m told by the American people that I need a heart.” “I’ve heard it’s true” says the Wizard. “Consider it done.” Then there is a great silence. Bill Clinton is just standing there looking around, but doesn’t say a word. Irritated, the Wizard finally asks, “WHAT BRINGS YOU TO THE EMERALD CITY?” “Is Dorothy around?”
2011 - 2012 Board of Directors and Committee Chairs
Web Page http://www.ebaea.org

President: Patty Pringle EA 510-912-1682
1st VP: Andy Rogers EA 510-332-0401
2nd VP: Gail Nanbu EA 925-943-3993
Treasurer: Marjorie Williams-Jones EA 510-482-6204
Secretary: Linda Koziol EA 925-449-1204
Immed Past Pres: Thomas Johnston EA 925-828-4500

Director 2011-2013:
  Mark Bole EA 925-287-0366
  Cherry Comstock EA 925-778-0281
  Sal Romo EA 510-471-9492
Director 2011-2012:
  Eva Konigsberg EA 510-928-5067
  Morris Miyabara EA 650-867-4507
  Irene Moore EA 510-791-8962x16
CSEA Director: Patty Pringle EA 510-912-1682

Communication Committee, (1st VP)
Chair: Andy Rogers EA 510-332-0401
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: Dan French 510-299-2764
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
Chair: Margie Hines EA 510-247-9255
Continuing Ed: Margie Hines EA 510-247-9255
Mini Seminar Team: Andy Rogers EA 510-332-0401
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: Thomas Johnston EA 925-828-4500
Bylaws/SOP: Sal Romo EA 510-471-9492
Budget & Finance: Walt Thomas EA 510-725-8356
Chapter Office: Dagmar Bedard EA 510-537-3863
Nominating: Peggy Hall EA 925-388-1040
Volunteer Coordinator: Patty Pringle EA 510-912-1682

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
2011 SPECIAL ENROLLMENT EXAM PREPARATION CLASSES

Presented By EAST BAY ASSOCIATION OF ENROLLED AGENTS

Part 1 – Individuals  Dates: July 9, 16, 23 CPE 18 hrs*

Part 2 – Businesses  Dates: Aug 13, 20, 27,  Sep 10, 17 CPE 30 hrs*

Part 3 -- Representation  Date: Oct 29  CPE 6 hrs*
* You must attend all 6 hours per day for credit  See pg 2 for CPE

Review – Part 1 (morning) Part 2 (afternoon) Date: Oct 22

Time: Saturdays 9:00 AM to 4:00 PM (Lunch is on your own)
Location: Holiday Inn Hotel, 6680 Regional St, Dublin CA 94568
Instructors: Pat Golden, EA; Tom Johnston, EA; Peter Lingane, EA; Andy Rogers, EA; and Bart Rugo, EA

Prerequisite: Basic knowledge in tax preparation of Form 1040

Total Price for all three parts and review - $700
Early discount by July 2 - $625
Separately - Part 1 $225, Part 2 $400, Part 3 $100, Review $100

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
2011-2012 DINNER SUBSCRIPTION

Automatic reservation at all eleven chapter dinner meetings for one price.
No increase in price for different venue or additional CPE.

Check one:

 _____ Beginning July eleven dinner meetings for the price of nine ($385 value for $315)

 _____ Beginning August ten dinner meetings for the price of nine ($350 value for $315)

No subscriptions accepted after August 17.

If you do not plan to attend a meeting, please call the chapter office and cancel that dinner. No refunds or other discounts. However, you may authorize a substitute attend in your behalf if you can't attend.

Enclose your check payable to: East Bay Association of Enrolled Agents and mail to the above address:

Name: ________________________________________________
Address: _____________________________________________
_____________________________________________________
Phone: ______________________________

Or you can reserve and pay online at https://www.123signup.com/calendar?Org=ebaea
It was announced that Prometrics will run the continuing Education programs for the PTIN signups (I assume this means for the RTRP education program).

- Both Alonzo Bennett (Exam) and Mel Hadley (Collections) indicated that there is currently no hiring until the next FY budget is approved.
- There was a spirited discussion of the fact that AUR sometimes does notify the Rep on cases, issue brought by Phil Fiegler. Phil to send Vivienne recent case where this occurred for follow-up.
- All IRS representatives agreed that AUR should be checking the master files for POAs, and that they certainly should not lose track of them if they have been submitted with the correspondence.
- Jayme Gallenson proposed an idea of bringing some experienced professionals into some type of joint training with IRS trainers and new hires. The idea would be to instruct the new hires on how things work the practitioner end in real life, and present ideas so the managers can figure out how to make the process as efficient as possible for all parties.
  - Rob Janes and Phil Fiegler are currently discussing this with Mel Hadley and it may be implemented by her.
- Questions were asked about how agents are trained after their “basic training.” RAs and ROs have 1 year probationary period while they are trained and brought up to speed. Initially, they are placed on easy cases. Mel remarked that 2 years would be nicer, but you do the best you can within confines of the system.
- POA Bypass situation/issues:
  - RO can bypass with letter from Group Manager. Letter contains canned content re stalling on providing financial information. Letter is sent to POA with threat to revoke or possibly refer to OPR if they continue to be uncooperative.
  - Related side issue – In a TFRP case where the POA is on file with the entity (i.e. corp. or partnership/LLC), and they are going after the individual responsible, the rep will not be notified unless they have POA on file for the individual. This was heads-up advice to make sure we also cover the individual to stay in the loop.
  - Not sure on this – perhaps verify with exam, but I believe for an exam bypass, it was said that request had to go up to Territory Manager and that GM alone could not initiate it.
- Jayme brought up the issue we have been briefly touching upon for around 3 meetings of having a “Tier 2” phone queue at PPS and ACS, sort of like software companies do for support. Issue was brought up originally by Phil Fiegler back 3 meetings ago. While no one spoke out against it, we do not know if it was ever kicked upstairs, or what the budgetary effect would be. The Tier 2 would be more experienced and knowledgeable employees, who could hopefully deal with the issues in a more complicated case, helping it (and inventory in general) be resolved faster.
- Appeals: Kerry Madeiros, stated that although the goal is six months, it is usually taking about a year to “get a case going” in appeals. There are only 7 offices in the west to send inventory to.
  - Related topic suggestion for next time – what can we do as practitioners to expedite the appeals process? Kerry will try and bring someone on the topic.
  - General appeals advice: Do proper research and know the tax laws to present our case (I’d say most of the folks in the room knew that, but we will pass it on to our constituency). Especially on the collection side, have documentation as complete as possible.
- Call appeals if you do not hear back from them. Be proactive to resolve case.
- Officers are instructed to close case if they do not hear back from TP or rep.
- If they ask us for something that makes us think, “Why are they asking me for that?” – we should call them and ask why.
- Streamlined OIC: Earns $50K, liability < $50K. BTW, I searched IRM and irs.gov for more info on this and the amount of information was nil in manual and vague on website. Perhaps in the future, we could receive more detail about how someone gets moved into a streamlined OIC and how we can help these clients.
  - More streamlined offers being accepted.
  - Very little independent review of financial information is done on them.
- Something was mentioned about SF Appeals being in a pilot program to mediate offer rejections, but I unfortunately did not hear what was said.
- Mel Hadley added that if we are working a TFRP case with an RO, you can still argue Doubt as to Collectibility, but you may not with a TFRP case in Appeals.
- Kerry stated that about 30-40% of offers which ended up in appeals are being accepted. It was not mentioned whether this was just SF office or nationwide.
  - Opinion from this author – I think this is further evidence that centralized OIC processing is very flawed.
17th Annual Tax Practitioner/IRS Town Hall Meeting

SAVE THE DATE

"STIMULATE, STABILIZE, and SUCCEED"

Learn how to maximize IRS resources to increase YOUR value to YOUR clients, and earn up to 7 hours of CPE!

Let Subject Matter Experts from the IRS clarify issues and hot topics of importance to YOU and YOUR tax practice.

Topics may include (subject to change):
* Update on Audits using Quickbooks
* Domestic Partner & Married Filing Separately
* Audit & Collections—Rumors & Reality
* Amended Returns
* TIGTA - Treasury Inspector General for Tax Admin
* FBAR--Foreign Bank & Financial Accounts

And much more……….NOT TO BE MISSED!

$150 FEE includes continental breakfast, lunch, and refreshments. ($125 Early bird registration on or before September 9, 2011.)

Look for upcoming announcements regarding registration details.

EMERYVILLE, CA
Monday, Sept. 19, 2011
For more information contact:
North Bay – Dot Clarke, EA
(415) 883-1933
Townhall@northbayea.org

FRESNO, CA
Wednesday, Sept. 21, 2011
For more information contact:
Central California - Vickie Strohl, EA
(559) 432-1251
VLstrohl@hotmail.com

SACRAMENTO, CA
Thursday, Sept. 22, 2011
For more information contact:
Big Valley– Connie Ferrell, EA
(209) 532-4053
connie@flavinea.com