The Bulletin

East Bay Association of Enrolled Agents

To Enhance and Protect the Professional, Economic, and Educational Interests of all Enrolled Agents

July 2011

NEXT MEETING Wed, July 20, 2011

Place: DUBLIN Holiday Inn (ex-Radisson)
4:30 Board Meeting
6:15 Networking
6:45 Dinner Buffet
7:30 Program: “SS & Medicare Update”

Cost: $35.00 with reservation by Friday July 15
$45.00 with reservation after deadline

Sign up online at:
https://www.123signup.com/calendar?Org=ebaea
(please print out your confirmation to ensure that you clicked all the right buttons to register) Questions: email ebea@ebaea.org (preferred) or call 800-617-1040.

July Topic: “Social Security & Medical Update – Mysteries Explained!”

Speaker: Rob Pepper, SSA PAS
by Irene Moore, EA Program Chair

This month we will get a behind-the-scenes look at the Social Security program, the Social Security statement, the online benefit estimator, online calculators, how benefits are calculated, retirement scenarios, when to start benefits, how work affects your benefits, other benefits payable (spouse’s, divorced spouse’s children), survivor benefits, a disability overview, insured status for disability, an overview of Medicare, taxation of benefits, how and when to apply for benefits, the Social Security website and how to use it, where to locate forms and publications, 800 number services, how to file online, and location of the local SSA offices and their services.

This is a great opportunity to not only brush up on SSA and Medicare for your clients, but to do a little planning for yourself and your own family.

Rob Pepper is the Bay Area Public Affairs Specialist for the Social Security Administration and provides outreach to the public about Social Security programs, policies and services.

Rob began his federal service as a volunteer for the Peace Corps in Venezuela and later worked for Peace Corps staff in Washington D.C. He began working for Social Security in 1979 as a Claims Representative and now has over 32 years with the administration.

Rob has offered to try to work answers to specific questions into his presentation, so if there’s a burning issue you want to see addressed, please email it to Irene Moore at irene@americantaxprofessionals.com by July 13 at the latest.

PRESIDENT'S MESSAGE
by Patty Pringle, EA

The East Bay Association of Enrolled Agents was well represented at the 35th CSEA Annual Meeting that was held in Pasadena. Not only are we one of the largest chapters in California we came away with some of the most prestigious awards. Congratulations to Joanne Anderson, EA the winner of the Thomas P. Hess Award for outstanding achievement in Education. Joanne was not present at the awards dinner and the award will be presented to her at our next dinner meeting on July 20th. Anne Arms, EA of the Solano Napa Chapter was the recipient of the award last year and will be presenting the award to Joanne. Please attend this meeting to show your appreciation to Joanne who has donated so much of her time to the educational offerings of the East Bay Chapter. Congratulations Joanne!!!

Peggy Hall, EA from the East Bay Chapter was the recipient of the PIA (Public Information Awareness) Award. This was the first time ever for this award and we are proud that it went to an East Bay Member. Congratulations Peggy!!!

Andy Rogers, EA was sworn in on Thursday, June 23rd as a Director of the CSEA Board, representing the East Bay chapter. It was great to see Andy in a suit. He was quite handsome and distinguished, but more im-
important he will serve the East Bay Members well. Congratulations Andy!!!

Many of you may not be aware that another member of the East Bay is the Chair of the CSEA Ethics Committee. Tom Johnston, EA (past president) of our chapter holds that post, and anyone who knows Tom is aware that he is a perfect fit for the job.

Morris Miyabara, EA, another East Bay Member, serves on the CSEA Legislative Committee. Morris’ compassion and dedication to legislative affairs will keep the members of the East Bay well informed as to what CSEA is currently doing in the legislative arena. This is vital to our chapter.

Margie Hines, EA the East Bay Education Chair was present at the CSEA Education Committee Meeting. Margie will keep us all informed on the new IRS CPE requirements. So much has changed and Margie has an eye for detail and will make sure we are compliant with the new changes.

Gail Nanbu, EA the 2nd VP of the East Bay Chapter was also present and attended many of the committee meetings. Membership, PIA, Finance and Budget. Gail wants to learn as much about CSEA as she can so when she becomes your president she will be well informed.

Next month I will write more about the President’s Workshop that Andy, Gail and I attended - all good stuff for our chapter.

**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

**GOT QUESTIONS FOR CA TAX AGENCIES?**

TALC is coming! The annual State Tax Agency Liaison Meeting is September 23, 2011 in Sacramento. If you have questions about systemic (not single-client) issues that you would like to have CSEA submit to the FTB, BOE or EDD, please get them to Vicki (Vicki@AmericanFinancialTax.com) within the next few weeks. This is an opportunity to have your questions answered by the top managers in these agencies. You’re also invited to attend in person, but you may have your question posed by CSEA to make sure it gets answered.

**CASTING CALL for ALL EXTROVERTS!**

The Membership Committee is asking for your help with the upcoming annual Member Orientation in October 2011. If you are creative, computer savvy, enjoy talking on the phone, enjoy greeting new members, or would just like to help out, please let us know. Contact Gail Nanbu, Volunteer Coordinator, at 925-943-3993 or email at nanbug@sbcglobal.net. You can help gather the variety of pamphlets, brochures, and other materials to be presented at that event. We are also looking for people to make telephone calls, send emails, and to greet everyone who comes to our dinner meetings. Come join us to brainstorm ways to increase our EBAEA membership and attract new members! We’d love to put your talents to work!

**NEW BOARD ELECTED**

_by Duncan Sandiland, EA, NomCom Chair_

At the 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 2011-2012:** 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

**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 August Bulletin. Flyers will be mailed shortly.
OUR WEBSITE – WHAT WOULD YOU DO?

A Board motion directed the Website Group to focus the EBAAEA website on services for our own members (rather than the general public seeking tax help), and further directed us not to duplicate services provided by CSEA or NAEA on their websites. The group met to talk about what content should appear on the chapter website. We decided to move “non-secret” items out of the password protected members-only section for convenience of use by members, such as SOP’s, Bylaws, and reimbursement request forms, the listing of Board Members and Committee Chairs (which needs to be updated and is already included in each Bulletin).

It was also decided to include a new Member Directory as a member benefit in the password protected members-only section. The guidelines for the proposed directory are that it must be “opt-in” only, so you must indicate you’re willing to be in the directory before you will be included. A profile of a member MAY include: member photo, searchable member contact info including email, address, phone, software used, focus of practice (i.e. “trusts and estates,” etc), and volunteer work with the chapter (i.e. who is the chair of the website committee).

Another item to include on the website is a new Membership Packet, currently under development by the Membership Committee.

There was a discussion of the vendor or vendors who will help with this service, and Eric is investigating costs and expertise, and will report back to the committee which will meet next on July 20th after the next EBAAEA board meeting, and just before the regular dinner meeting.

EBAAEA EMAIL LISTS

EBAAEA 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

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!

CSEA LEGISLATIVE AFFAIRS UPDATE

by Morris Miyabara, EA

Here are my observations from the CSEA meeting held at the Super Seminar in Reno.

Although I was able to sit in on other committee meetings the one I was most enthused about was the Legislative Affairs Committee chaired by Gary Ans-pach. Briefly, it went like this: The Staff Report described in detail the extensive advocacy presence of CSEA’s publications with key legislators and in attendance at IRS and California tax agency meetings.

CSEA’s legislative plans were reviewed and discussed. We heard reports from the Conformity Task Force, NAEA GRC Report as well as a CTEC Report.

Jennifer Tannehill from Aaron Read Associates gave us a rundown on current proposed legislation that affects the interests of EAs. The status for possible CSEA action on the following bills:

- SB 542 - granting EAs exemption from licensing as a Professional Fiduciary
- SB 653 - authorizing counties and school districts to levy local taxes on the populace
- SB 342 – prohibits contingency fees in all tax matters
- AB 856 - conforming to the Federal Mortgage Forgiveness Debt Relief Act
- AB 242 - conforming to the health care and the personal income tax
- AB 1523 - conforming to the Regulated Investment Company (RIC).

Should anyone want to know more about these bills, go to www.leginfo.ca.gov and do a search by bill number.

The committee unanimously agreed to recommend to the CSEA Board that CSEA join the coalition led by the California Taxpayers Association opposing SB 653. Just this afternoon, June 7, I received word that the bill’s author Darrel Steinberg did not have enough votes to move this bill so he placed the language in a special session Budget Trailer Bill so he could keep it alive and use it in budget negotiations. Now a new bill to watch is SB 123 which is the amended bill to SB 653 with the Steinberg language. Isn’t this legislative stuff FUN?

A proposal was made to the California Board of Accountancy to change the wording of the "safe harbor" cover letter for non-licensee preparation of financial statements. In 2000 CSEA was instrumental in negotiating the language in this letter. All EAs will have an opportunity to comment on these proposed changes.

We discussed the 2011-2012 transition of the committee structure agreements and expectations. It’s going to be exciting! Furthermore, strategic discussion centered on moving advocacy efforts forward, this will be an ongoing discussion. The theme for 2010-11 was “Tools and Training”, the theme for 2011-12 is “More Tools and Better Training”.

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**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, July 13 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

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**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.

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**Small Group Tax Meetings**

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<tr>
<th>Location</th>
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<th>Time</th>
<th>Location</th>
<th>Day</th>
<th>Time</th>
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<tr>
<td>Brentwood Area</td>
<td>Fridays</td>
<td>8:00am</td>
<td>Brentwood Cafe, 8500 Brentwood Blvd, Brentwood</td>
<td>Ken Seamann EA</td>
<td>(925) 634-8297</td>
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<td>Danville Area</td>
<td>4th Tues</td>
<td>9:30am</td>
<td>Pascals French Oven, 155 Railroad Ave, Danville</td>
<td>Michael Power EA</td>
<td>(510) 366-8836</td>
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<td>Oakland Area</td>
<td>2nd Tues</td>
<td>8:00am</td>
<td>Buttercup Cafe, 229 Broadway, Oakland</td>
<td>Andy Rogers EA</td>
<td>(510) 332-0401</td>
</tr>
<tr>
<td>Livermore Area</td>
<td>Fridays</td>
<td>8:45am</td>
<td>Shari’s Restaurant, 1116 East Stanley Blvd, Livermore</td>
<td>Jerrilyn Krebs EA</td>
<td>(925) 606-8181</td>
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<tr>
<td>Castro Valley</td>
<td>3rd Tues</td>
<td>8:00am</td>
<td>Norman’s Grill, 3638 Castro Valley Blvd, Castro Valley</td>
<td>Dagmar Bedard EA</td>
<td>(510) 537-3883</td>
</tr>
<tr>
<td>South Alameda County</td>
<td>1st Wed</td>
<td>9:30am</td>
<td>Dino’s, 1 block W of I-880 on Industrial Blvd, Hayward</td>
<td>Sal Romo EA or Walt Thomas EA</td>
<td>(510) 487-1691</td>
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**Email-only Group**

as needed

Send an email to halloftaxes@hotmail.com

Peggy Hall EA (925) 388-1040

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**BADGES! BADGES!**

Joanne Anderson has accumulated a stockpile of spiffy EBAEA name badges for these members. Please contact her (925-938-9086) or, better yet, come to a meeting to pick up your badge:

- Jack Anderson
- Richard Ahern
- Debra Block
- Tina Bolden
- Herman Catalan
- Cherry Comstock
- Elizabeth Crayton
- Lynn Crossman
- Phil Fleschler
- Gina Fresquez
- Mitchell Friedman
- Carol-Ann Glyder
- Sidney Hwahn
- Monty Lee
- Janice Perkins
- Carol Robinson
- Ursula Santos
- Barbara Simon
- Jenni Stone
- Dale Stone
- Jan Zobel

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**HELP AVAILABLE**

Enrolled Agent with 35 years experience seeking per diem work beginning 8/1. Lacerte user since 1987. Experience with all versions of QB, Word, Excel, Outlook and PowerPoint. Owner 15 years, employee 20 years. Familiar with all types of returns but mostly individuals. References available upon request. Call 925-828-8332 or email VonLeo@aol.com

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**MEMBERS SPEAK**

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

**July 12:** Andy Rogers “Basic Payroll” in San Francisco; SBA Office 455 Market Street, 6th floor, 9 am – 3 pm with an hour for lunch; info (510) 332-0401 Andy@TaxBuddha.com

**July 19:** Andy Rogers “How to Prepare Schedule C” in San Francisco; SBA Office 455 Market Street, 6th floor, 6 pm - 8:30 pm; info (510) 332-0401 Andy@TaxBuddha.com

**July 21:** Andy Rogers “Basic Payroll” in Oakland; Elihu M. Harris State Building, 1515 Clay Street, Room 11, Second Floor, 9 am – 3 pm with an hour for lunch; info (510) 332-0401 Andy@TaxBuddha.com
That amount of indebtedness is loans (in the USA totaled but not including Consumer borrowing (e.g., credit cards and auto loans) as of 2/28/11. That amount of indebtedness is 5.1% less than the $2.55 trillion of nationwide consumer credit as of 2/28/09. (Federal Reserve)

With every technological breakthrough, an old-fashioned tradition dies. In this case, we're losing the tradition of burning the midnight oil: Sweating over a pencil and paper the night of April 15, trying to calculate those deductions, then spilling cold coffee all over the tax return and having to start all over. Whew, aren't we glad those days are over? In this new, improved era, we can sweat over a computer keyboard and unfamiliar software program the night of April 15, then spill cold coffee into our computer, resulting in a shower of sparks and a small fire. - Steve Brewer, Albuquerque Tribune, 3/30/06

“The taxpayer-- that’s someone who works for the federal government but doesn’t have to take the civil service examination.” - Ronald Reagan

“The collection of any taxes which are not absolutely required, which do not beyond reasonable doubt contribute to the public welfare, is only a species of legalized larceny.” - Calvin Coolidge

“We [tax lawyers] teach the rich how to play it so they can stay rich-- and the IRS keeps changing the rules so we can keep getting rich teaching them.” - John Grisham

HUMOR

A doctor and a lawyer in two cars collided on a country road. The lawyer, seeing that the doctor was a little shaken up, helped him from the car and offered him a drink from his hip flask. The doctor accepted and handed the flask back to the lawyer, who closed it and put it away. “Aren’t you going to have a drink yourself?” asked the doctor. “Sure,” replied the attorney, “after the police leave.”

Psychiatrist to Internal Revenue Officer: “Nonsense! No way does everyone in the world hate you. Everyone in the US perhaps, but certainly not everyone in the world.”

At a restaurant last summer my wife and I met a couple who were friends of my wife. After lunch, the women decided to go shopping, and I invited the man to go sailing. While we were out on the water, a storm blew up. The tide had gone out, and we were down wind trying to work our way back through a narrow channel. At one point the boat grounded and we had to climb overboard and shove with all our might to get it back in deep water. As my new friend stood there, ankle deep in muck, the wind blowing his hair wildly, rain streaming down his face, he grinned at me, and with unmistakable sincerity said, “Sure beats shopping.
### 2011 - 2012 Board of Directors and Committee Chairs

*Web Page [http://www.ebaea.org](http://www.ebaea.org)*

<table>
<thead>
<tr>
<th>Position</th>
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<tbody>
<tr>
<td>President</td>
<td>Patty Pringle EA</td>
<td>510-912-1682</td>
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<tr>
<td>1st VP</td>
<td>Andy Rogers EA</td>
<td>510-332-0401</td>
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<tr>
<td>2nd VP</td>
<td>Gail Nanbu EA</td>
<td>925-943-3993</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Marjorie Williams-Jones EA</td>
<td>510-482-6204</td>
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<td>Secretary</td>
<td>Linda Koziol EA</td>
<td>925-449-1204</td>
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<td>Immed Past Pres</td>
<td>Thomas Johnston EA</td>
<td>925-828-4500</td>
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<td>Director 2011-2013:</td>
<td>Mark Bole EA</td>
<td>925-287-0366</td>
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<td>Cherry Comstock EA</td>
<td>925-778-0281</td>
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<td></td>
<td>Sal Romo EA</td>
<td>510-471-9492</td>
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<tr>
<td>Director 2011-2012:</td>
<td>Eva Konigsberg EA</td>
<td>510-928-5067</td>
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<tr>
<td></td>
<td>Morris Miyabara EA</td>
<td>650-867-4507</td>
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<tr>
<td></td>
<td>Irene Moore EA</td>
<td>510-791-8962x16</td>
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<tr>
<td>CSEA Director</td>
<td>Patty Pringle EA</td>
<td>510-912-1682</td>
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**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  925-386-1040
- **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

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<tr>
<td>Social Affairs</td>
<td>Dan French</td>
<td>510-299-2764</td>
</tr>
<tr>
<td>Website</td>
<td>Eric Rheinheimer EA</td>
<td>510-893-3601</td>
</tr>
<tr>
<td>IRS Practitioner Panel</td>
<td>Phil Fiegler EA</td>
<td>510-530-1174</td>
</tr>
<tr>
<td>CTCE Panel</td>
<td>Walt Thomas EA</td>
<td>510-487-1691</td>
</tr>
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**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  925-912-1682
- **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  510-471-0492
- **Budget & Finance:** Walt Thomas EA  510-725-8356
- **Chapter Office:** Dagmar Bedard EA  510-537-3863
- **Financial Review:** Shelagh Gallagher EA  510-614-1834
- **Nominating:** Peggy Hall EA  925-386-1040
- **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](mailto:ebaea@ebaea.org)
Ed. Note: Past EBAEA President Peggy Hall, EA, received the first-ever CSEA PIA award at the CSEA Annual Meeting last month. The following is what she would have said then, had she known she was a frontrunner for the award.

PIA AWARD

When accepting the very first ever awarded PIA award I did not know what to say. While I am extremely honored and happy to be recognized, and know that I put a lot of effort into PIA this year, I am a little embarrassed because so many people in CSEA are doing so much in the area of PIA.

So how can I advance the meaning of this award? I want to encourage all of you! Working alone in this area doesn’t work because it is discouraging when you hear how few people know what an Enrolled Agent is. So why put ourselves out there, go to colleges, and put together media commercials about Enrolled Agent? I went to visit a longtime member of CSEA who I have never seen at our meetings. He told me that being an EA is not relevant to his work; his work stands on its own merits. He showed me his letterhead and it didn’t include the words EA or Enrolled Agent. Are there others EA’s who feel the same way? Of course!

How can YOU help? When you introduce yourself, always include the words Enrolled Agents. We all want to take the shortcut and describe what we do rather than say we are an EA, because we get tired of hearing “what is an EA?” Do not take that shortcut! Use this opportunity to explain that Enrolled Agents have the highest standards in all of their work, whether preparing tax returns, representing clients, doing their books or whatever adjunct Service they provide. Explain that we are trusted advisors because our clients know we care about them, and we advocate for them whenever possible. Explain that we network with other EA’s to make sure we get our questions answered before we prepare their returns and we use our combined leverage to go to our state and federal legislators as well as the IRS to remind them of the rights of our clients.

And that is what our Public Information Awareness Campaign is about. So that when we tell people we are an Enrolled Agent they know our professionalism and highest standard. We can charge what we are worth! PIA helps your bottom line! And speaking of the bottom line you are the best form of PIA. To wage an extensive PIA campaign to have the public understand that we are “The Tax Professional” will cost money that CSEA does not have. It doesn’t cost anything for you to take more care in informing the public. So please use the words Enrolled Agent whenever you introduce yourselves, answer the phone, or in your own advertising. It does not cost you any more money, and maybe we can raise the percentage of the public who understand what an Enrolled Agent does!

So, thank you so much for the first ever PIA award. Together let’s increase the value of this award by raising the standard of the recipients. Get creative, put yourselves in front of organizations, and go to colleges and high schools to talk with prospective Enrolled Agents. Find other venues to promote our profession. One plus one makes three - we encourage each other! Go Enrolled Agents!
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

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

Scholarships: See CSEA and NAEA Websites for information.

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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.
- 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.
Learn how to maximize IRS resources to increase your value to your clients and earn up to 7 CPE Federal Credits. Let Subject Matter Experts from IRS and CSEA clarify issues and hot topics of importance to you and your tax practice. Get the latest including:

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To pay by check, fill out the form below and mail to:
Barbara Sullivan EA, North Bay CSEA
17 Harcourt St Ste D
San Rafael, CA 94901

**Wednesday 21-Sep-11**
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**Thursday 22-Sep-11**
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SOLANO-NAPA CHAPTER

PRESENTS 7th Annual

MINI SEMINARS

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Special Pricing Deadline is August 08, 2011

Friday, Aug 19, 2011

Surviving the Mortgage Interest Audit & Available Interest Tracing Tools

A step by step example of a correspondence mortgage interest audit from beginning to end.

We will review IRS correspondence, and the steps needed to prove/disprove mortgage interest taken on the client prepared return, the work papers to be prepared to respond to the IRS and the source documents clients must supply to deal with this problem. Many of the techniques used in this presentation will work as well for interest tracing of Sch. C, F and E.

Friday, Sept 16, 2011

Retirement Accounts & HSAs

Rules and regulations regarding set up, contribution to, distributions from, and beneficiary situations regarding IRAs, Roth IRAs, SEP-IRAs and HSAs. The ordinary and not so ordinary. What you need to prepare a correct return.

Friday, Oct 28, 2011

Internal Revenue Code Research

We are going to begin by viewing the entire body of the United States Code. Then, we are going to research the Internal Revenue Code using the logic established in the Table of Contents, which is located at the front of the IRC.

We work in an industry where practitioners are often unsure of their findings. They often feel that they are not on solid ground when making recommendations to a client or when preparing a tax return. The closer that that practitioner can get to a solid “authoritative source”, the more likely that the practitioner’s stance will stand up to a challenge.

For questions and additional information Contact Alma Guenther, EA at 707-643-2226 or almaea@pacbell.net
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**August 19, 2011  9:00 am to 1:00 pm**

Surviving the Mortgage Interest Audit & Available Interest Tracing Tools

Presented by Gerald Pusateri, EA
Federal: 2 hour  Calif.: 2 hour  Level: Intermediate

**September 16, 2011  9:00 am to 1:00 pm**

Retirement Accounts & HSAs

Presented by Alma Guenther, EA
Federal: 4 hour  Calif.: none  Level: Intermediate

**October 28, 2011  9:00 am to 1:00 pm**

Internal Revenue Code Research

Presented by Michael P Cunningham, EA
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