**NEXT MEETING** Wed, August 17, 2011

Place: **DUBLIN Holiday Inn (ex-Radisson)**
-(go to http://www.holidayinn.com/hotels/us/en/dublin/dubrm/hoteldetail#Directions) or take BART!

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>4:30</td>
<td>Board Meeting</td>
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<tr>
<td>6:15</td>
<td>Networking</td>
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<tr>
<td>6:45</td>
<td>Dinner Buffet</td>
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<tr>
<td>7:30</td>
<td>Program: “Enhancing your Practice”</td>
</tr>
</tbody>
</table>

Cost: $35.00 with reservation by Friday August 12
$45.00 with reservation after deadline

Sign up online at: [https://www.123signup.com/calendar?Org=ebaea](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 ebaea@ebaea.org (preferred) or call 800-617-1040.

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**August Topic: “Keys to Enhance the Value of Your Practice”**

**Speaker:** Gary McKinsey, EA

*by Irene Moore, EA Program Chair*

Gary brings us an easily-followed framework to painlessly help us analyze our business. You will learn practice enhancement tools that you can use to reduce your stress and enhance the value of your practice. Using these tools you will be instrumental in guiding yourself, your staff and your clients to achievement:

- Questions to ask in determining what practice goals you want to achieve.
- Identifying steps you need to take to achieve your goals.
- Identify staffing or support requirements.
- Creation of your marketing and training calendar.
- Avoiding pitfalls in communication.
- Identifying marketing tools to reach your target market.

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Gary is an Enrolled Agent and Graduate Fellow of the National Tax Practice Institute. He has served as a representative to both the White House and the California Governor’s Small business Conference. For over 30 years he has been engaged in income tax preparation and representation. His focus is small business tax and business planning issues. He is a Certified Guerrilla Marketing and One Page Business planning coach. He conducts adult business education classes for Yosemite Community College and is a frequent speaker for business and professional organizations.

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**PRESIDENT’S MESSAGE**

*by Patty Pringle, EA*

The Past, the Present and the Future.

I’ll begin this article with a quote from the late John F. Kennedy: “Leadership and learning are indispensable to each other”.

Thanks to all of you who have served and volunteered in the past to make our chapter what it is today. Your passion, dedication and ideas paved the way and laid the foundation for our chapter. At our August Dinner Meeting I will ask you to stand and be recognized for your contribution. Your legacy lives on. Learning about the history and previous leadership of an organization is vital in understanding how to move forward.

Presently your chapter leadership is pursuing innovative ways to build on the foundation of EBAEA past leadership and working on ways to lay the ground work for your future leaders. Hence the Executive Advisory Committee was formed; Duncan Sandiland, Peggy Hall, Tom Johnston, Andy Rogers, Gail Nanbu, Linda Koziol, Marjorie Williams-Jones and yours truly, Patty Pringle. The committee meets once a month either via teleconference or in person to review and gauge progress on our “three year strategic plan for our chapter”. The idea is not reinvent the wheel but to improve it. Major areas of focus are: Membership, Education, Website Development and Public Information Awareness.

In June, 1 and 1st VP Andy Rogers and 2nd VP Gail Nanbu all had the opportunity to participate in the
CSEA-hosted President’s Workshop held in Pasadena. We were joined by the Chapter Presidents from all 19 chapters throughout California, who shared valuable information about what works and what doesn’t work in their chapters. Additional topics included the history of CSEA and our roles and responsibilities as leaders at both the local and state level. It was all good stuff.

Our members are the most important part EBAEA. Please let us know what we can do to improve to best serve our members.

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 10 remaining 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 ten dinners (value $350).

This plan is only offered through our August meeting and takes your summer vacation into consideration. 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 August meeting 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.

TAKE BART TO MEETINGS? – YES!!!

by Marjorie Jones, EA

The new West Dublin/Pleasanton BART station is wonderful for getting to EBAEA meetings. It took over four years to build and I would look at it wistfully as I passed by on my way to the monthly meeting, knowing that the trip was going to take another 30 – 45 minutes. Since the new station was opened in February, the trip from my downtown Oakland job takes a total of 45 minutes – train ride of 35 and a ten minute walk.

The station has helpful signs pointing the exits to “Dublin” or “Pleasanton”. For the EBAEA meetings at the Holiday Inn, take the “Dublin” side. Walk down the stairs and continue down the same street (Golden Gate Drive) to the first left, St. Patrick Way (more of a very wide paved alley than a street). This is a bit funky, as the overflow parking lot is still a fenced-in weed garden, but there’s a sidewalk. BART continues to improve this beautiful new station and the plan is to make this all a nice walkway, but in the meantime it still gets me to the meetings in record time. If you’d like to meet up with me for the next trip to the meeting, send me an email to Marj@MarjTax.com.

SAVE THE DATE TaxTalk 2011

by Patty Pringle, EA, Seminar Chair

This year’s Tax Talk Seminar will be held at the Holiday Inn Dublin. Be sure to mark your calendar for November 2nd, 3rd, and 4th. You don’t have to travel far to get your CPE requirements. Beat the traffic and take BART (5 minute walk from BART to the seminar). If you prefer to stay overnight we have negotiated a special $80 per night room rate with the Holiday Inn if you register before October 10, 2011.

Best Education Bargain in the Bay Area. 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 2011 Seminar provides 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 relevant to all tax professionals.

- Twila Slesnick, PhD, EA - Retirement Planning and Related Issues for our Clients
- Claudia Hill, EA, MBA - From Entity to Individual - K-1 to 1040; also Sched C Hot Buttons
- Vicki Mulak, EA, CFP - 2011 Tax Law Update for the California Practitioner
- Andy Rogers, EA - How to Prepare for an Audit
- Jennifer MacMillan, EA - Ethics
- Lisa Ihm, EA - “COD” Important Stuff You May Be Missing

Wednesday, November 2nd is our “Tax Talk After Hours” featuring Joe Calderaro, EA, CSEA Tax Resource Specialist

Please check out the last section of this bulletin for additional details and pricing.

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
QUICKBOOKS FILES AND IRS AUDITS

There has been a substantial amount of discussion about the new IRS instructions to us to supply a full copy of our client’s QuickBooks file, along with the administrative password, during any audit. Disregarding the issue of what you should or should not provide the IRS, a major question has been “How on earth do I modify the file to restrict access?” Modifying QuickBooks files is not a task for the novice or the faint of heart.

At least ten years ago, Doug Sleeter taught an EBAEA miniseminar on QuickBooks tips. Ever since then, your humble editor has subscribed to the Sleeter Group’s QB consulting network at www.sleeter.com. While most of the traffic is technical and beyond my needs, every once in a while a true gem drops, that more than pays for the annual subscription. Such was the case recently, when questions arose about how to prepare a QB file for an IRS audit.

The overwhelming response was to contact Karl Irvin at www.q2q.us. Karl has written a suite of QB utility programs, most of which are available to download and demo at your own pace. Although I have no personal experience with these programs, they have been given the best possible recommendations for years, so if you find yourself in this position, consider giving them a try.

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!

SPEAKER DEVELOPMENT

by Andy Rogers, EA

The August Speakers Development meeting has not been scheduled as of press time. If you’d like to be included on the group’s 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!

***MARK YOUR CALENDAR***

2011 PRACTITIONER/IRS TOWN HALL

by Linda Koziol, EA

“Stimulate, Stabilize, and Succeed”

The 2011 Town Hall Meeting will be hosted this year by the North Bay chapter on Monday, September 19, 2011. The all-day event will be held at the Hilton Garden Inn in Emeryville beginning at 8am. The registration form is included in this Bulletin.

IRS presenters will cover a variety of topics including Registered Domestic Partners, audits using accounting software, criminal investigations and FBAR.

The regular price is $150, but that is discounted to $125 if you register on or before September 9, and includes continental breakfast, lunch and refreshments. Be sure not to miss out on a great opportunity to learn directly from IRS subject matter experts.

Mark your calendar and register early!

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, August 3 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

<table>
<thead>
<tr>
<th>Small Group Tax Meetings</th>
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<tbody>
<tr>
<td><strong>Antioch /Brentwood</strong></td>
<td>Fridays 8:00am</td>
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<tr>
<td>Brentwood Café, 8500 Brentwood Blvd, Brentwood</td>
<td>(925) 634-8297</td>
</tr>
<tr>
<td>Ken Seamann EA</td>
<td></td>
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<tr>
<td>(925) 634-8297</td>
<td></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>
</tr>
<tr>
<td>Michael Power EA</td>
<td></td>
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<tr>
<td>(510) 366-8836</td>
<td></td>
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<tr>
<td><strong>Oakland Area (Near BART)</strong></td>
<td>2nd Tue 8:00am</td>
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<tr>
<td>Buttercup Café, 229 Broadway, Oakland</td>
<td>(510) 332-0401</td>
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<tr>
<td>Andy Rogers EA</td>
<td></td>
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<tr>
<td>(510) 332-0401</td>
<td></td>
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<tr>
<td><strong>Livermore Area</strong></td>
<td>Fridays 8:45am</td>
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<tr>
<td>Shari’s Restaurant, 1116 East Stanley Blvd, Livermore</td>
<td>(925) 606-8181</td>
</tr>
<tr>
<td>Jerrilynn Krebs EA</td>
<td></td>
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<tr>
<td>(925) 606-8181</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>Norman’s Grill, 3638 Castro Valley Blvd, Castro Valley</td>
<td>(510) 537-3883</td>
</tr>
<tr>
<td>Dagmar Bedard EA</td>
<td></td>
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<tr>
<td>(510) 537-3883</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>(510) 487-1691</td>
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<td><strong>Email-only Group</strong></td>
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<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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<td>(925) 388-1040</td>
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WEBSTE UPDATE
by Eric Rheinheimer, EA, Website Chair
The list of officers and committee chairs has been updated, and moving the “non-secret” items out of the password protected members-only section should be complete soon. We’re getting three quotes for the programming work for a new Member Directory as a member benefit in the password protected members-only section. You will have to be a member of East Bay Association to access the member directory—just one of the benefits of membership!

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). We’ll let you know when we have this working.

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.

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

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

August 2: Andy Rogers “Basic Payroll” in San Francisco; 455 Golden Gate Avenue, 9 am – 3 pm with an hour for lunch; info (510) 332-0401 Andy@TaxBuddha.com

August 25: Mark Bole “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 (925) 287-0366 mark@binccomputing.com

CALENDAR OF EVENTS

August 2011
3 Audit & Representation group meeting @ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette
17 EBAEA Dinner Meeting: “Enhance Your Practice” @ Holiday Inn, Dublin

September 2011
7 Audit & Representation group meeting @ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette
19 17th Annual Practitioner/IRS Town Hall Meeting @ Hilton Garden Inn, Emeryville
21 EBAEA Dinner Meeting: “Estate Asset Basis” @ Holiday Inn, Hegenberger Rd, Oakland
23 CSEA State Tax Agencies Liaison @ Sacramento
24-25 CSEA Board & Committee meetings @ Sacramento

October 2011
12 Audit & Representation group meeting @ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette
19 EBAEA Dinner Meeting: “QuickBooks audits” @ Holiday Inn, Dublin

HMMMMM...
Net interest costs of the federal government (interest paid to holders of Treasury debt) are projected to be $225 billion during fiscal year 2011 (the 12 months ending 9/30/11), then rising to $792 billion during fiscal year 2021, a +252% increase over the decade. (CBO)

The unfunded retiree health care liability of the 50 largest cities in the state of Massachusetts ($17.9 billion) is 2 ½ times as large as its unfunded retiree pension liability ($7.2 billion). No money has been set aside to account for the retiree health care liability amount, i.e., it is 100% unfunded (Mass Taxpayer Foundation).
HUMOR

Attending a wedding for the first time, a little girl whispered to her mother “Why is the bride dressed in white?” “Because white is the color of happiness, and today is the happiest day of her life.” The child thought about this for a moment then said “So why the groom wearing black?”

Internal Revenue Agent to worried taxpayer being audited: “Yes, Mr. Smith, I am afraid we do want to make a federal case out of it.”

Starting this year, everyone in Romania practicing the arts of witchcraft or fortune telling has to pay a 16 percent income tax, plus contribute toward health and pension plans. Predictably, the irate witches are striking back. Not by dressing in three-cornered hats or writing heated letters to the editor. That’s the wimpy American way. In Romania, they’re taking the time-honored direct route. They’re casting evil spells on President Traian Basescu and members of his administration. And it’s working. - Sam Venable, knoxnews.com 4-11-11

Tariff: A scale of taxes on imports designed to protect the domestic producer against the greed of his consumer. - Ambrose Bierce, The Devil’s Dictionary

An accountant once told me that the definition of fair market value for tax purposes is the value arrived at in negotiations between a willing tax lawyer and a willing revenue agent, neither of whom has ever bought or sold anything of consequence in his life. - Paul H. Asofsky, retired Weil Gotshal partner

“I must be the only person in America that, every time I pay the maximum tax rates, every time I sign that tax form, I smile. I thank God I live in a country that gave me a chance to make the money I do.” – President Bill Clinton

“And God said: ‘Let there be Satan, so people don’t blame everything on me. And let there be lawyers, so people don’t blame everything on Satan.’” - George Burns

### 2011 - 2012 Board of Directors and Committee Chairs

**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

**Main Office**

**Director 2011-2013:**

- Mark Bole EA  925-287-0366
- Cherry Comstock EA  925-778-0281
- Sal Romo EA  510-471-9942

**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

**PIA**: Peggy Hall EA  925-388-1040

**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**: vacant

**Program**: Irene Moore EA  510-791-8962x16

**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**: vacant

**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

**Financial Review**: Tim Hintzoglou EA  925-930-7737

**Nominating**: Thomas Johnston EA  925-828-4500

**Volunteer Coordinator**: Gail Nanbu EA  925-943-3993

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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
2011 SPECIAL ENROLLMENT EXAM PREPARATION CLASSES

Presented By EAST BAY ASSOCIATION OF ENROLLED AGENTS

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

Pricing - 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 ten remaining chapter dinner meetings for one price.

No increase in price for different venue or additional CPE.

_____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
2011 TAX TALK

Holiday Inn - 6680 Regional Street, Dublin, CA 94568

Nov. 2, 3, & 4 - 8:00 AM – 5:00 PM

Presented By

EAST BAY ASSOCIATION OF ENROLLED AGENTS

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

Nov. 2: Twila Slesnick, PhD, EA - Retirement Planning and Related Issues for our Clients (4 Hours)

Claudia Hill, EA, MBA - From Entity to Individual – K-1 to 1040 (2 Hours)
Schedule C Hot Buttons – Red Flags for Audits (2 Hours)

“Tax Talk After Hours” with Joe Calderaro, EA, CSEA Tax Resource Specialist

Nov. 3: Vicki Mulak, EA, CFP - 2011 Tax Law Update for the California Practitioner (8 Hours)
(a blend of federal and California updates)

Nov. 4: Andy Rogers, EA - How to Prepare for an Audit (2 Hours)

Jennifer MacMillan, EA - Ethics (2 Hours Required)

Lisa Ihm, EA - “COD” Important Stuff You May Be Missing (4 Hours)

All 3 Days (24 Hours CPE)
NAEA/CSEA Members $499 before 10/16/11 $529 after
Non-Members $529 before 10/16/11 $559 after

Additional Early Bird Discount of $34 if postmarked before 9/15/11

Any One Day
NAEA/CSEA Members $199 before 10/16/11 $229 after 10/15/11
Non-Members $229 before 10/16/11 $259 after 10/15/11

Included in cost: continental breakfast, lunch and afternoon snacks

• Learning level: All Courses Intermediate
  Update Provides General Review of New Developments
• CSEA and its Chapters have been recognized as a qualified sponsor of continuing education by the Office of Professional Responsibility to meet the requirements of 31 Code of Federal Regulations §10.6(f), covering maintenance of attendance records, retention of program outlines, qualifications of instructors and length of class hours.
• “The California Society of Enrolled Agents & its local Chapters have been recognized as an approved curriculum provider by the California Tax Education Council. Successful completion of this course may be reported to fulfill the continuing education requirement of the California Business & Professions Code §22250-22259. This does not constitute an endorsement by the California Tax Education Council as to the quality of the course or its contribution to the professional competence of the preparer.”
• CSEA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. EBAEA is a member of CSEA. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be addressed to the National Registry of CPE Sponsors 150 Fourth Ave. N., Suite 700, Nashville, TN, 37219-2417 or by visiting their website www.nasba.org.

Refund Policy: Requests for registration refunds must be postmarked by October 15, 2011. All refunds are subject to a service charge of $50.00 per person.
For Additional Information Contact Seminar Chair: Patty Pringle at 510-912-1682 e-mail: eapattypringle@sbcglobal.net
LUNCH MENU SELECTIONS

Wednesday:

Pork Loin Dijonaise
Chicken Piccata
Vegetable Lasagna

Thursday:

London Broil
Chicken Dijonaise
Garden Vegetable Risotto

Friday:

Salmon
Chicken Pomodoro
Eggplant Parmesan
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:

- Update on Audits using Electronic Accounting Software: *What is really required to be provided?*
- RDP: Registered Domestic Partners: *How difficult is this going to get?*
- Audit & Collections: *Rumors & Reality? Email us the rumors you have heard!*
- CID: Criminal Investigation: *Money, Lies and Taxes - do they match?*
- FBAR - Foreign Bank & Financial Accounts: *Not as foreign as you think!*

**Monday 19-Sep-11**
Hilton Garden Inn - Emeryville
1800 Powell St
Emeryville, CA 94608
Phone: (510) 658-9300
Fax: (510) 547-8166

Sign up for this date at: [www.123signup.com/event?id=cfqmp](http://www.123signup.com/event?id=cfqmp)

For more information contact:
North Bay – Dot Clarke, EA
(415) 883-1933 [Townhall@northbayea.org](mailto:Townhall@northbayea.org)
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**
Ramada Inn – University
324 E Shaw Avenue.
Fresno, CA 93710
Phone: (559) 224-4040
Fax: (559) 222-4017

Sign up for this date at: [www.123signup.com/event?id=cfymy](http://www.123signup.com/event?id=cfymy)

For more information contact:
Central California – Vickie Strohl, EA
(559) 432-1251 [vilstrohl@hotmail.com](mailto:vilstrohl@hotmail.com)
To pay by check, fill out the form below and mail to:
CCCEA
1319 W Bullard Ave. #4
Fresno, CA 93711

**Thursday 22-Sep-11**
Hilton Sacramento Arden West
2200 Harvard St
Sacramento, CA 95815
Phone: (916) 922-4700
Fax: (916) 922-8418

Sign up for this date at: [www.123signup.com/event?id=cftcv](http://www.123signup.com/event?id=cftcv)

For more information contact:
Big Valley – Connie Ferrell, EA
(209) 532-4056 connie@flavinea.com
To pay by check, fill out the form below and mail to:
Big Valley, CSEA
P.O. Box 850
Soulsbyville, CA 95372-0850

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**REGISTRATION FORM**

**Please complete a separate form for each participant.**

**Name:** ____________

**Company:** ____________

**Address:** ____________

**City:** ____________ **State:** ____________ **Zip Code:** ____________

**Phone:** (______) _______ **Fax:** (______) _______

**Email Address:** ____________

*Email Address is required for registration confirmation.*

**How did you hear about the event?**

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**For CPE Credits please provide the following:**

EA# __________ CPA# __________ BAR# __________

CTEC# __________ Other __________

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**Registration 7 AM / Workshop 8 AM to 4 PM**

**FOLLOW US ON TWITTER.COM!**

Search “townhallmeeting”

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**Payment:** (Includes Continental Breakfast, Lunch & Refreshments)

- [ ] Early Bird - $125  [ ] After Sept 9, 2011 - $150

**CREDIT CARD PAYMENT IS PREFERRED**

Or use Your ATM Card with VISA/MasterCard logo through secure online payment processing at:

- [www.123signup.com/event?id=cfqmp](http://www.123signup.com/event?id=cfqmp) for 19-Sep-11 in Emeryville
- [www.123signup.com/event?id=cfymy](http://www.123signup.com/event?id=cfymy) for 21-Sep-11 in Fresno
- [www.123signup.com/event?id=cftcv](http://www.123signup.com/event?id=cftcv) for 22-Sep-11 in Sacramento

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**USE THIS FORM ONLY IF PAYING BY CHECK**

- [ ] Registration & Check are enclosed
- [ ] Check only is enclosed

(Registration faxed or entered online)

**TOTAL ENCLOSED**

$ __________
# 17th Annual Tax Practitioner / IRS - Town Hall Meeting

"Stimulate, Stabilize and Succeed"

Monday, September 19, 2011
Hilton Garden Inn – Emeryville
1800 Powell Street, Emeryville, CA 94608
8:00 a.m. – 4:00 p.m.

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 am – 8:00 am</td>
<td>Registration &amp; Continental Breakfast</td>
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</table>
| 8:00 am – 8:20 am | Welcome & Opening  
Jayme Gallenson, CSEA North Bay Chapter |
| 8:20 am – 10:00 am | Audit & Collection – Rumors & Reality  
Alonzo Bennett, Examination Territory Manager – IRS  
Mel Hadley, Collection Territory Manager – IRS |
| 10:00 am – 10:20 am | Morning Break |
Gerry Kelly-Brenner, Senior Stakeholder Liaison – IRS |
| 11:10 am – 12:00 pm | Criminal Investigation  
Arlette Lee, CI Public Information Officer – IRS |
| 12:00 pm – 1:00 pm | Lunch |
| 1:00 pm – 2:40 pm | RDP: Registered Domestic Partners  
Cynthia Leachmore, EA  
Brenda Voet, Program Specialist – FTB |
| 2:40 pm – 3:00 pm | Afternoon Break |
| 3:00 pm – 3:50 pm | Update on Audits Using Electronic Accounting Software  
Michelle Harrow, Revenue Agent Group Manager – IRS |
| 3:50 pm – 4:00 pm | Closing  
Jayme Gallenson, CSEA North Bay Chapter |
**SOLANO-NAPA CHAPTER**

PRESENTS

7th Annual Mini Seminars

9:00 am to 1:00 pm

Fairfield Inn & Suites
315 Pittman Rd
Fairfield, CA 94534
(707) 864-6672

Continental Breakfast Included

**Deadline:** Monday the week before the event (8/8 for Aug, 9/5 for Sept and 10/17 for Oct)

**Special price for all three sessions!**

Per Session **$94**

All 3 Sessions **$225**

*After deadline price will be $104 per session*

Special Pricing Deadline is August 08, 2011

For questions and additional information
Contact Alma Guenther, EA at 707-643-2226 or almaea@pacbell.net

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**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.
**SOLANO-NAPA CHAPTER**

**INTRODUCES THE 7th ANNUAL**

**Solano-Napa Mini Seminars**

Education for EAs & Unenrolled Preparers

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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

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**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

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

Internal Revenue Code Research

Presented by Michael P Cunningham, EA
Federal: 4 hour  Calif.: none  Level: Intermediate

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Registration online at

Includes Continental Breakfast
All seminars at
Fairfield Inn & Suites - 315 Pittman Rd
Fairfield, CA 94534  Ph: (707) 864-6672