December 2011

NEXT MEETING Wed, December 21, 2011

Place: OAKLAND AIRPORT HOLIDAY INN
(go to http://www.hioaklandairport.com/oakland-ca-hotel-directions.asp)

4:00 Board Meeting
5:45 Networking
6:15 Dinner Buffet
7:15 Program: “The Ethics Investigation”

Cost: $35.00 with reservation by Friday December 16
$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 ebaea@ebaea.org (preferred) or call 800-617-1040.

December Topic: The Ethics Investigation
(meets 2 hours Ethics requirement!)

Speaker: Tom Johnston, EA
by Irene Moore, EA Program Chair

This month we will have an overview of what happens when CSEA receives a complaint against a member. The presentation is authored by Robert P. Helman, EA and presented by our own Past President Tom Johnston, EA, who currently serves as Chair of CSEA’s Ethics and Professional Conduct Committee. You will gain an appreciation for CSEA’s valuable member benefit to deflect complaints away from government agencies and still maintain high ethical standards for the profession. From a real case study, you will learn procedures and tools you can use to improve your ethics and business practices and avoid others’ mistakes. You will also be given resources to help you train your employees. Prospective investigators will receive valuable training to provide service to CSEA and NAEA.

Tom Johnston, EA maintains a tax practice in San Ramon specializing in individual returns, estates & trusts and representation for his clients. He has conducted ethics investigations for NAEA and CSEA and has mediated numerous complaints for members of CSEA. Tom is a fellow of NTPI, and serves as instructor and chair of our SEE class. Come and put on your Sherlock Holmes hat for this very enlightening CPE event!

PRESIDENT’S MESSAGE
by Patty Pringle, EA

Our November dinner meeting was one to be remembered. It began by recognizing and thanking all veterans in attendance, who then came forward. Retired US Coast Guard Commander Sal Romo, EA, expressed the significance of serving one’s country. Next, Sal introduced a color guard from Boy Scout Troop 201 out of San Ramon as they presented the Colors and led us in the Pledge of Allegiance. November is a great month to be thankful for our veterans, our families, friends and our community.

CSEA President Jean Nelsen, EA was our guest speaker that evening. Before her presentation Jean presented the EBAEA’s President Commendation to Tom Johnston, EA for all the volunteer work he has done at both the state and local level. Congratulations Tom!!! Thank you for your time and dedication. Tom is also the Chair of the CSEA Ethics Committee and will be doing a 2 hour Ethics Investigation presentation at the December 21, 2011 dinner meeting which will be held in Oakland at the Holiday Inn.

In November I had the opportunity to attend the NAEA Board of Directors Meeting in Albuquerque, NM. NAEA is rolling out a newly redesigned website which should be available in the near future. Be sure to check out the New Brand (logo) with the tag line “Po-
wering America’s Tax Experts” now up on the current NAEA website. At the beginning of December, ballots will be sent out via email and voting for new NAEA officers and directors will begin. You can check out the current candidates on the NAEA website. In addition, we discussed strategic planning, EA awareness, and how NAEA can get the word out about Enrolled Agents.

NAEA is also working on a PowerPoint presentation “How to Avoid an Audit”. Local chapters can give the presentation to local organizations such as the Chamber of Commerce.

After the NAEA Board meeting I was selected for one of the 24 spots (representing 19 states) at the NAEA Schuldiner/SmoFllan Memorial Leadership Academy. Over the next two and a half days, we had several sessions led by NAEA Deputy Director Sam Matlick, CAE; NAEA Executive Vice President Michael Nelson, CAE and 2011-2012 NAEA President Sherrill Trovato, MBA, MST, EA, USTCP. Discussions included: Leadership styles, Governance and Board, Strengthening Governance, Strategic Planning, Financial Oversight, Board Meetings, Committee and Task Forces and the Future of Our Association. A lot of that sounds rather dry and possibly boring, but it was all really good stuff for our chapter, and I will be passing on all the information I learned to the future leaders of our chapter. It was truly an inspirational experience.

January 6, 2012 is CSEA’s Jim Stern Legislative Day. If you have never had the opportunity to attend, this is a wonderful way to get to know and visit your state representatives in Sacramento at the State Capitol. Additional information is available on the CSEA website.

I’d like to close this article by wishing all of you “Very Happy Holidays”. If you will be attending the December 21 dinner meeting in Oakland please don’t forget to bring a toy to donate to “Toys for Tots”. Joanne Anderson, EA will collect the donated toys and has volunteered to take them to a local charity.

QUICKFINDERS
By Diann Gross, EA

Attached to this newsletter is the special EBAXA group discounted 2011 Quickfinder order form. Please note that this special pricing is only available if sent through me as a group order using this form. All books will be delivered directly to you. The deadline for all orders is DECEMBER 1st – ORDER RIGHT NOW. I urge you to FAX your orders early using the special code: Q521 on the new QUICKFINDER order form attached to this newsletter. Questions, call me at (925) 736-3853 Voice/Fax.

TOYS FOR TOTS

Once again, we will be supporting the US Marine Corps’ annual Toys for Tots drive. Please bring a new, unwrapped toy to the December dinner meeting. Joanne Anderson will collect them all and take them to the USMC collection center. Call Joanne at (925) 938-9086 with any questions. Thank you, and thanks Joanne.

ON THE EDGE WITH LEG islative
by Eva Konigsberg, EA

Who cares what you think about it? The Franchise Tax Board does. The FTB holds mandatory public meetings each year where industry representatives and individual taxpayers present the FTB with their proposals for changes to California's tax laws. This annual hearing takes place during an FTB meeting. This year it’s set for Dec 1st, 2011 in Sacramento.

My colleagues on the Legislative Committee at CSEA have told me it is a good experience to hear and see what advocacy work looks like up close and personal, and every once in a while they make a change we recommend.

Members should identify any issues that you think the FTB should be hearing about. You can pass them on to me or Morris Miyabara, chairperson of the EBAE Leg Committee. We will channel them to Vickie Mulak who will present on behalf of our membership. Additionally, I’m planning to go to this and invite other members to come too. Get in touch with me to coordinate.

There’s another event the Leg Committee is gearing up for: the annual Jim Stern Legislative Day. The next Jim Stern Legislative Day will take place Friday, January 6th, 2012. This is where EAs go and meet our representatives in Sacramento. We tell them what EAs are, what we do and what our concerns are regarding tax issues. If this seems daunting, this year the Leg Committee has decided to focus on training and roll playing in the morning, before you go out and talk with someone. No fear, just fun. Well, maybe it will be a bit outside your comfort zone, but in a good way - and you will have a lot of support!

Here’s what one of our fellow EAs had to say about the experience: “By introducing myself and other North Bay Chapter members to our Assemblyman, Jared Huffman, I am now a resource for his office on tax issues. Assemblyman Huffman has utilized Enrolled Agents for a financial literacy workshop that he sponsored and considers EAs to be the ‘go to’ tax professionals. By the way, he had never heard of Enrolled Agents when we met with him the first time.” – Gary Anspach, EA. Gary must have enjoyed the experience, because he’s now taken on chairing CSEA’s committee. This is another event I’ll be attending and I invite you to join me.
YES, THIS AFFECTS YOU TOO:

In the October Bulletin Morris Miyabara wrote an article stating the California Board of Accountancy (CBA) was considering changes to the safe harbor language used by non-CPA preparers when preparing financial statements. At that time the CPA was leaning toward stronger disclaimers. Chuck Taylor, EA, is the Chair of CSEA’s Channel Island Chapter Legislative Committee and the President of California Society of Accounting and Tax Professionals. He provided the following update: At the CBA meeting in late Sept 2011, the CBA decided to implement the proposed changes.

Specifically, CBA approved making it mandatory that non-CPA financial statement preparers use the following disclaimer: “We [I] are [am] not licensed by the California Board of Accountancy for the preparation of these financial statements. If compiled, reviewed or audited financial statements are desired, the services of someone licensed by the California Board of Accountancy would be required.”

Subsequent to the CBA’s decision, this new required disclaimer goes to the state legislature for approval or rejection. A hearing will be held in March 2012. If it’s not struck down by the Legislature at that meeting, the only way to get rid of the requirement is to go to Superior Court and contest it in court. If you want to help out on this issue, Chuck asks that you please get in touch with him: Chuck Taylor, EA. His email is: taylor4tax@aol.com. His company is Charles R. Taylor Tax & Business Services and he can be reached at 805-494-5099.

The CSEA Leg Committee folks are suggesting that if it becomes law (which would happen around June 30th of next year), we would follow the disclaimer with a tag line that states that we are EAs, and goes on to explain what we are licensed to do. The Committee is considering exactly how that tagline might read.

RDPs: If you’ve done even one same-sex married or RDP return this past season, you know how problematic the new federal filing requirements are. Since issuing the Memorandum that requires the use of community property rules in preparing these federal returns, neither Commissioner Shulman nor the Service has issued follow up guidance on implementation. The 1040 instructions and Pub 555 (Community Property) are silent about how to report certain items of income and cannot be relied upon as binding authority (and some of what’s said therein is contradictory.) The Leg Committee has drafted a letter to the Commissioner advocating for guidance on the most pressing open-ended issues. It also recommends some action items that would protect same-sex taxpayers who are now disadvantaged.

Cannabis: One other item of significance came up after the CSEA meeting. The IRS announced in early October that medical cannabis dispensaries cannot deduct standard business expenses such as payroll, security or rent in determining taxable net profit. The IRS ruling is based on an obscure portion of the tax code -- section 280E -- passed into law by Congress in 1982, at the height of the Reagan administration’s war on drugs. The law, originally targeted at drug kingpins and cartels, bans any tax deductions related to “trafficking in controlled substances.” The current ruling was made as part of an audit of Harborside Health Center in Oakland. Under the IRS’ math, Harborside owes an additional $2 million in tax for 2007 & 2008.

IRS refused to comment on the specific case. Harborside has 90 days to appeal. 16 states and the District of Columbia have legalized medical cannabis. The projected total legal medical cannabis market is estimated at $1.7 billion in 2011. Most observers believe this action is intended to shut down the industry in all 16 states & DC. It coincides with actions on the part of other federal agencies to torpedo the industry. On October 12th, federal attorneys announced they will begin to prosecute media outlets that publish advertisements for medical cannabis. In late September, a memo issued by the Bureau of Alcohol, Tobacco, Firearms, and Explosives (ATF), asserted that it is a violation of federal law to possess a gun or ammunition if you are a marijuana user, by definition, including state-legal medical cannabis patients. Around the same time, the US Department of Justice (DOJ) started sending letters to property owners who rent to medical cannabis tenants threatening prosecution and asset forfeiture proceedings.

We’ll keep you posted on where all this goes! Please contact me with any questions at eva@savvytax.com or at (510)-928-5067.

LOCATION NEEDED

Do you know a nice, fairly inexpensive location (Moose lodge, community center, etc) where we could hold our mini seminars? If you know of a place, could you contact Peggy Hall at halloftaxes@gmail.com or 925 388-1040.

Also, we are looking for a special someone who has a passion for education and would like to help plan our mini seminars.

TAX QUESTIONS KEEPING YOU AWAKE?

Here are a few resources to get your questions answered:

- The NAEA webboard is fantastic. Go to NAEA.org, Member Resources, Member Community. You have to register with your NAEA number.
- Ask at questions@clientwhysconnect.com
- Email group within our chapter. Send a request to Mike Power mpower@powerinvesting.net to be added to the email group. Ask a question and get answers from your colleagues at EBAEA.
Joe Calderaro is a participant in this group so you may get an answer from him.

- LegalBitStream is a great resource for tax case law, all IRS materials and legislation links
- You can register at Spiddell at www.caltax.com for a tax forum on California taxes.
- Taxalmanac.org is a great place to ask and answer questions.
- Taxsites has links to useful sites.

If you have a favorite resource to share email Peggy Hall at halloftaxes@gmail.com

SOME THING USEFUL ON FACEBOOK!!
Useful recent bits from CSEA’s Facebook page:
- IRS Transcript Delivery System (TDS) improvements will be implemented on Oct. 17:
  - Your e-services mailbox, currently called a “Secure Object Repository” (SOR), will be called a “Secure Mailbox”
  - Taxpayer and product information combined to one page.
  - Ability to set tax year range and submit multiple tax forms in one request.

For details, go to: www.irs.gov/taxpros/article/0, id=247078,00.html

The IRS has launched a new program that will enable many employers to resolve past worker classification issues and achieve certainty under the tax law at a low cost by voluntarily reclassifying their workers. Employers may get into compliance by making a minimal payment (@1% of 2010 or 2011 payments to ICs) covering past payroll tax obligations rather than waiting for an IRS audit: www.irs.gov/pub/irs-drop/a-11-64.pdf

IRS Notice 2011-81 provides the 2011-2012 special per diem rates for taxpayers to use in substantiating the amount of ordinary and necessary business expenses incurred while traveling away from home: www.irs.gov/pub/irs-drop/n-11-81.pdf

EBEA EA EMAIL LIST S
- 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

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 the notice.

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 WANTED
Senior Tax Preparer (EA or CPA) and Tax Preparer (EA or CRTP) for Secure Taxes, Inc, in Hayward. Must be capable of completing accurate, timely tax returns using Lacerte. Must be reliable, responsible and detail oriented. Five to ten years of verifiable experience as an EA, CPA or CRTP required. Please forward a detailed cover letter outlining experience and a resume with at least three professional references to Kim Kastl, EA at personnel@yoursecuretaxes.com. For complete job descriptions go to www.yoursecuretaxes.com.

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

HELP AVAILABLE
Tax Preparer, EA, CPA, 35 years experience seeks full-time, part-time, or per diem work for individual income tax preparation. Lacerte user for about 25 years. Prefer Hayward, Castro Valley or Brentwood, Antioch, Oakley areas. Call Charleen at (925) 872-4075 or email ckdtax@aol.com

REFERRALS AVAILABLE
EBAEA member launched an on-line presence last season that generated 50 new, paying clients directly from on-line sources. Need to off-load the TY11 referrals (expect 100+ referrals) for reasonable compensation to an experienced, reputable, tech-savvy firm with great customer service. Oakland-based practice preferred. Contact devin@class5tax.com for more information.
**Small Group Tax Meetings**

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<th>Area</th>
<th>Date</th>
<th>Time</th>
<th>Location</th>
<th>Contact</th>
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<tbody>
<tr>
<td>Antioch / Brentwood</td>
<td>Fridays</td>
<td>8:00am</td>
<td>Brentwood Café, 8500 Brentwood Blvd, Brentwood</td>
<td>(925) 634-8297</td>
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<td>Ken Seamann EA</td>
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<td>Danville Area</td>
<td>4th</td>
<td>9:30am</td>
<td>Pascals French Oven, 155 Railroad Ave, Danville</td>
<td>(510) 366-8836</td>
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<td>Michael Power EA</td>
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<td>Oakland Area (Near BART)</td>
<td>2nd</td>
<td>8:00am</td>
<td>Buttercup Café, 229 Broadway, Oakland</td>
<td>(510) 332-0401</td>
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<td>Andy Rogers EA</td>
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<tr>
<td>Livermore Area</td>
<td>Fridays</td>
<td>8:45am</td>
<td>Shari's Restaurant, 1116 East Stanley Blvd, Livermore</td>
<td>(925) 606-8181</td>
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<td>Jerrilynn Krebs EA</td>
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<td>Castro Valley</td>
<td>3rd</td>
<td>8:00am</td>
<td>Carrow's, 2723 Castro Valley Blvd @ Lake Chabot, CV</td>
<td>(510) 537-3883</td>
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<td>Dagmar Bedard EA</td>
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<td>South Alameda County</td>
<td>1st</td>
<td>9:30am</td>
<td>Mimi's, 24542 Hesperian, Southland Mall, Hayward</td>
<td>(510) 487-1691</td>
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<td>Sal Romo EA or Walt Thomas EA</td>
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<td>Peggy Hall EA</td>
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<td>(925) 388-1040</td>
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**MEMBERS SPEAK**

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

**December 1:** Andy Rogers “How to Prepare Your First Schedule C” in Oakland; 250 Frank Ogawa Plaza, 2nd floor (near 12th St BART), 2 - 4:30pm; info Andy@TaxBuddha.com or (510) 332-0401

**December 13:** Andy Rogers “Basic Payroll” in San Francisco; 455 Golden Gate Avenue, 10am - 4pm with an hour for lunch; info Andy@TaxBuddha.com or (510) 332-0401

**January 10:** Andy Rogers “Basic Payroll” in San Francisco; 455 Golden Gate Avenue, 10am - 4pm with an hour for lunch; info Andy@TaxBuddha.com or (510) 332-0401

**CALENDAR OF EVENTS**

**December 2011**

1. Quickfinders order deadline
2. Audit & Representation group meeting @ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette
3. EBAEA Dinner Meeting: “Ethics” (2 hours) @ Holiday Inn, Hegenberger Rd, Oakland

**January 2012**

6. Jim Stern Legislative Day @ state legislative offices, Sacramento
6-8. CSEA Board and Committee Meetings @ Sacramento
11. Audit & Representation group meeting @ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette
18. EBAEA Dinner Meeting: “Federal Tax Update” @ Holiday Inn, Dublin

**February 2012**

15. EBAEA Dinner Meeting: “FTB Tax Panel” @ Holiday Inn, Dublin

**March 2012**

21. EBAEA Dinner Meeting: “IRS Tax Panel” @ Holiday Inn, Hegenberger Rd, Oakland

**HMVMM...**

Total foreign aid spending by the US government in fiscal year 2011 (the 12 months ending 9/30/11) was $40 billion or just slightly more than 1% of our government’s $3.6 trillion spending for the year. (OMB)

Total US debt held by the public (not including intergovernmental debt) stated as a percentage of the size of the US economy was 72% at the end of fiscal year 2011 (9/30/11), the highest debt level in the country since the ratio was 80% at the end of fiscal year 1950. (OMB)

Authors Carmen Reinhart and Kenneth Rogoff have written a paper (“This Time is Different: Eight Centuries of Financial Folly”) on sovereign debt and its impact on a country’s ability to grow. The authors conclude that a country’s growth slows substantially once the country’s level of public debt exceeds 90% of the size of its economy. (Peterson Institute for International Economics at Harvard)

Total household debt in the US was $13.3 trillion as of 6/30/11, 88% of the size of our $15.0 trillion economy. The debt-to-economy ratio was 62% in 1990. (Federal Reserve)

76% of the capital gains taxes paid by individual taxpayers are paid by Americans making at least $250,000 of adjusted gross income. (IRS)

Private sector employers of union workers pay 3½ times as much money for retirement benefits (per hour worked by an employee) as compared to private sector employers of non-union workers. (Dept of Labor)
HUMOR

Bob was in trouble. He forgot his wedding anniversary. His wife was really pissed. She told him “Tomorrow morning, I expect to find a gift in the driveway that goes from 0 to 200 in 6 seconds AND IT BETTER BE THERE!!” The next morning he got up early and left for work. When his wife woke up, she looked out the window and sure enough there was a box gift-wrapped in the middle of the driveway. Confused, she put on her robe, ran out to the driveway, and brought the box back in the house. She opened it and found a brand new bathroom scale. Bob has been missing since Friday.

The supermarket had a sale on boneless chicken breasts. I intended to stock up. At the store, however, I was disappointed to find only a few skimpy prepackaged portions of the poultry, so I complained to the butcher lady. “Don’t worry,” she said, “I’ll pack some more trays and have them ready for you by the time you finish shopping.” Several aisles later, I heard the lady butcher’s voice boom over the public-address system: “Will the gentleman who wanted bigger breasts please meet me at the back of the store?”

The doctor, sighed and said, “I’ve got some bad news. You have cancer, and you’d best put your affairs in order.” The woman was shocked, but managed to compose herself and walk into the waiting room where her daughter had been waiting. “Well, daughter, we women celebrate when things go well, and we celebrate when things don’t go so well. In this case, things aren’t well. I have cancer. So, let’s head to the club and have a martini.” After 3 or 4 martinis, the two were feeling a little less somber. There were some laughs and more martinis.

They were eventually approached by some of the woman’s old friends, who were curious as to what the two were celebrating. The woman told her friends they were drinking to her impending end, “I’ve been diagnosed with AIDS.” The friends were aghast, gave the woman their condolences and beat a hasty retreat. After the friends left, the woman’s daughter leaned over and whispered, “Momma, I thought you said you were dying of cancer, and you just told your friends you were dying of AIDS! Why did you do that?” “Because I don’t want any of those women sleeping with your father after I’m gone.” And THAT is what is called “Putting Your Affairs In Order”.

2011 - 2012 Board of Directors and Committee Chairs
Web Page http://www.ebaea.org  Bulletin editor: bulletin@ebaea.org (Duncan Sandiland EA)
President: Patty Pringle EA 510-912-1682
Quickfinders: Diann Gross EA 925-736-3853
1st VP: Andy Rogers EA 510-332-0401
Social Affairs: Dan French 510-299-2764
2nd VP: Gail Nanbu EA 925-943-3993
Website: Eric Rheinheimer EA 510-893-3601
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IRS Practitioner Panel: Phil Fiegler EA 510-530-1174
Secretary: Linda Koziol EA 925-449-1204
CTEC Panel: Walt Thomas EA 510-487-1691
Immed Past Pres: Thomas Johnston EA 925-828-4500
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 510-449-1204
VITA Team: vacant
Communication Committee, (1st VP)
Chair: Andy Rogers EA 510-332-0401
Administration Committee (IPP)
Chair: Thomas Johnston EA 925-828-4500
Bulletin: Duncan Sandiland EA, etc 800-617-1040
Bylaws/SOP: Sal Romo EA 510-471-9492
Disaster Services: Janet Bridges EA 510-505-0818
Budget & Finance: Walt Thomas EA 510-725-8356
Legislative: Morris Miyabara EA 650-867-4507
Chapter Office: Dagmar Bedard EA 510-537-3883
Membership: Peggy Hall EA 925-388-1040
Financial Review: Tim Hintzoglou EA 925-930-7737
Membership: Gail Nanbu EA 925-943-3993
Nominating: Thomas Johnston EA 925-828-4500
Practice Preservation: Linda Fox EA 925-846-5913
Volunteer Coordinator: Gail Nanbu EA 925-943-3993
PIA: Eva Konigsberg EA 925-928-5067
PIA: Peggy Hall EA 925-388-1040
PIA: Eva Konigsberg EA
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
Be prepared to answer client questions and save tax dollars! This new perfect-bound book is packed with all the significant tax acts and legislation passed in 2009 through the spring of 2010.

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

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

Premium Quickfinder Handbook
A handy combination of the most important 1040 and Small Business topics that you need to complete tax returns for individuals and businesses.

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

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

California Tax Quickfinder Handbook
Covers Individuals, Corporations, and Pass-through entities. This Handbook has 24 chapters in a perfect bound book, and includes more than 300 pages of individual and business tax information provided in one source.

Social Security and Medicare Handbook
Provides CPAs, enrolled agents and other tax preparers with an affordable, easy-to-use Handbook for quickly and efficiently accessing the information their clients want to know about Social Security, Medicare, Medicaid, and Eldercare insurance.

IRA and Retirement Quickfinder Handbook
Get all the quick answers you need about IRAs and retirement plans in one handy source, as only Quickfinder can provide. In addition to concise discussions of important topics, you’ll get loads of quick reference tables, charts, checklists, worksheets, examples and other useful information.

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

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

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

Individuals—Special Tax Situations Quickfinder Handbook
This Handbook steers preparers through the maze of unique tax rules that apply to individuals due to their occupations, their investments, or because they are going through certain life events.

OTHER QUICKFINDER PRODUCTS

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

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

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

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