February 2012

As in years past, the session will be transcribed and the questions and answers will be emailed to everyone on the Chapter NEWS mailing list, so if you’re not subscribed to that list, go to

http://ebaea.org/cgi-bin/dada/mail.cgi

and select the NEWS list from the pull-down menu and follow the simple instructions to subscribe to that list.

Our panelists will be Karen Brosi, EA, CFP®, and Steve Sims, EA, from FTB. Steve is one of the few FTB employees you’ll ever meet who is also an EA. He has been with FTB for over 25 years and has worked as an auditor, collection supervisor, and project manager. He is the FTB Taxpayer Advocate. Steve is living proof that good guys do sometimes wear black hats.

Karen, who is deservedly well-known to most of us, has been practicing in Palo Alto for over 20 years. She is a Certified Financial Planner® and an Enrolled Agent. She was a senior tax specialist and director of financial planning at a respected Palo Alto CPA firm before forming her own practice. Karen is a past president of Golden Gate Chapter and past officer of CSEA. She a speaker at CSEA SuperSeminars and for Western CPE and writes for several major tax publications.

(dinner meeting CE details on page 2)

February Topic: FTB Tax Panel
Speakers: The Dynamic Duo: Karen and Steve!
by Irene Moore, EA Program Chair

This month we will have our annual panel discussion on California tax issues. If time allows, questions will be taken during dinner, but they will be answered in the order received, with all the emailed questions going first. If your question is complex, PLEASE email it in early so the panel will have a chance to research it before the event.

It is crucial to email your questions to Mike Power (MPower@PowerInvesting.Net) before 3pm on Monday, Feb. 13th, if you want to have the best chance of having them answered. If Mike does not email you back within 24 hours of your submission confirming that he received your question, then please call him at (510) 366-8836 to ensure he received it.

PRESIDENT’S MESSAGE
by Patty Pringle, EA

Here we go again, organizers have been mailed, software has been updated and calendars are filling up fast. Now it’s time to hit the ground running. Remember you don’t have to go it alone! One of the best advantages and benefits of being a member of the East Bay Chapter is networking. If you have a tax question or just want to run something by another EA remember you can reach out to one of your fellow members for help. We’re all in this together!

January was a busy month for East Bay Chapter.
On January 6th CSEA hosted Jim Stern Legislative Day in Sacramento and the event was well attended by members of the East Bay Chapter. This was a great opportunity to visit with our state legislators to both educate them on who CSEA is and what we as Enrolled Agents do. On one of my visits it was great news to hear that the legislative aide in the office uses an Enrolled Agent to do her taxes.

The next two days were CSEA Board and Committee Meetings. The Public Information and Awareness Committee received approval to spend $5,000 for public advertising using social media. The funds will be used for Google Ads and on Facebook. Google Analytical will be utilized as a way to measure usage. The Board also approved the Education Committee spending $21,000 for digital capture of the upcoming Super Seminar for online education. One of CSEA’s business partners, Placer Insurance presented a check to CSEA for $6,000. The CSEA Nominating Committee announced the 2012-2013 slate of officers:

- President – Raven Deerwater, EA
- 1st Vice President – Patricia Kappen, EA
- 2nd Vice President – Devang Mehta, EA
- Secretary – Susan Growney, EA
- Treasurer – Don Stacy, EA

It was also announced that the San Diego and Palomar Chapters will co-host the 2015-2016 Annual Meeting. (Reminder: the East Bay and Big Valley Chapters are co-hosting the 2014-2015 Annual Meeting.)

The Nominating Committee for the 2012-2013 slate of officers and directors for the East Bay Chapter are: Tom Johnston, EA (chair), Sal Romo, EA and Dagmar Bedard, EA. If you are interested in serving as an officer or on the Board or have recommendations please contact them. We are looking for dedicated leaders.

The CSEA Membership Committee announced that the deadline for submitting nominations for awards (such as Enrolled Agent of the Year) is the fourth Friday in April (April 27th). New this year is the “Membership Growth and Retention Award” to recognize and honor a member(s) of the Society who have contributed significantly toward CSEA’s membership goals, through volunteer efforts, innovative ideas and accomplishments in the area of member retention and recruitment of new members. For additional information and instructions on how to submit a nomination, log on to the CSEA Website, go to “About CSEA” and scroll down to “Awards”.

Last year two East Bay Chapter Members were recipients: Peggy Hall, EA for the “Public Information and Awareness Award” and Joanne Anderson for the “Thomas P. Hess Award”. We’re proud of these members. Wouldn’t it be wonderful if next year we can announce that another member(s) of EBAEA are so honored?

On January 28th our chapter had a very successful “Shred Fest 2012” in Castro Valley. The weather was great and we had a good turnout. The goal was to inform the public about Enrolled Agents and we certainly did that. We will hold another one later this year in a different location. The plan is to hold at least two annual “Shred Fests” and advertise well in advance. Stay tuned.

Be sure to check out the newly updated and improved NAEA Website, with even more good information you can use.

In closing I wish everyone a prosperous and stress free tax season.

**DINNER MEETING CE DETAILS:**
- CTEC Course # 1001-CE-7064 California 1 Hour
- Enrolled Agents – NAEA/CSEA 1 Hour
- Target Audience: Enrolled Agents, Attorneys, CPAs, Unenrolled Preparers
- Learning Level: Level 2 (Intended to expand the working knowledge of the practitioner and exposes them to specialized areas of taxation and tax management. This level explores the details about more unusual tax situations or consequences and gives the practitioner the tools to assist clients in these areas).

**WE NEED YOUR HELP**

The nominating committee is looking for members who are willing to give a few hours a month to help govern East Bay chapter. No prior experience is necessary; only a desire to give back and help our profession grow. East Bay has a tradition of reaching out to our members and providing the best professional benefits around. We can only do that with your help. If you would like to serve on the Board of Directors or nominate someone else for office please contact a member of our nominating committee. The committee is: Tom Johnston, EA, Dagmar Bedard, EA, and Sal Romo, EA. Tom can be reached at: 925-828-4500 or taxtomea@comcast.net.

**WELCOME NEW MEMBERS!**

Welcome to these members that have joined in the last few months.

- Robert D’Amours, EA
- Alison Johnson, EA
- Sarah Neider, EA
- Hongn go T. Ngo, EA
- Alfred Wise, EA
- Gretchen Kohl, Professional Associate

If you joined within the last few years and did not receive a certificate of membership from EBAEA (which is in addition to the CSEA welcome packets), and you would like one, please contact the Chapter Office at (800) 617-1040. The Membership Committee co-chairs are Gail Nanbu, EA, pgnanbug@gmail.com and Peggy Hall, EA, halloftaxes@gmail.com. Let us know if we can help you with anything. Also, we would be happy to pair you with a mentor from EBAEA.
**Google AdWords and Analytics at CSEA**

During the CSEA PIA Committee meeting in January, CSEA staffer Ashley Soy described the use of Google Analytics available for the CSEA website, which has been in place since November 2011. This allows us to see how people are getting to the website, and where they linger. Mostly the 7,000 visitors appear to be EAs searching for some version of CSEA. The PIA committee proposed and agreed to spend $5,000 of restricted funds - funds specifically earmarked for PIA efforts -- on Google AdWords and Facebook directed to the general public during tax season, which was subsequently passed by the Board. These ads are up and active now for people searching for terms like "tax help" -- but let’s not all search for these terms as we have a limited budget per day and once our budget limit is reached, our ads don’t appear to anyone for the rest of the day!

**March 2 is Tax Help Day**

*by Andy Rogers, EA*

We will be staffing a table to answer tax questions from the general public for free, we will not prepare any returns, just answering questions verbally. I have a couple of volunteers already but I need to ‘staff’ up the day. Our location sponsor has requested I specifically ask for people who can speak Spanish (I do not). We’ll be there from 9 am to 4 pm, but please let me know you’ll be there if you can commit to a block of time. We will have doughnuts! This is a function of the Public Information and Awareness committee to let people know what Enrolled Agents are, and to provide a public benefit of our member's experience. Feel free to tell people about the event!

Friday, March 2 at the Oakland Women’s Initiative for Self Employment in Conference Training Room, 2nd floor, 519 17th Street, Suite 240, Oakland. For more information and/or to volunteer for a block of time: Andy@TaxBuddha.com

**CSEA Ethics Committee Develops Disengagement Letter**

Terminating a business relationship is never easy. And with tax professionals as busy as they are, there is limited time to handle unpleasant or complicated situations and handle them properly.

To make this process a little easier and to ensure accurate information is provided, the Ethics and Professional Conduct Committee has crafted a disengagement letter template for CSEA Members’ use. Irene Lawrence, EA played a key role in this project, working closely with legal counsel and drafting the template, which can be found in the Members Area of the CSEA website.

The letter, which can be modified and customized, provides clients with notification of the disengagement, reasons for ending the relationship (Members are to choose one) and what further steps need to be taken. As a reminder, the Ethics and Professional Conduct Committee recommends that disengagement letters be sent to their recipients via certified mail, to ensure acknowledgement of receipt.

Log into the Members Area of the CSEA website and find the letter template under Forms and Letters, along with other templates available for use. CSEA thanks Irene Lawrence, EA and the Ethics and Professional Conduct Committee for their hard work on this project.

**Audit Representation Group – Now Improved with CPE**

The “Audit and Representation Group” generally meets on the second Wednesday of each month from 9:30 til 11:30am. We’ll present an audit ‘case’ and discuss audit and representation in general. New IRS regs allow us to give CPE credit, but there’s a catch. To provide CPE, we need a case to discuss sent to Andy@TaxBuddha.com in advance so we can get the info to the IRS properly. If we have a case, and you want the CPE, please bring $5 and your PTIN number, and we'll mail you a certificate (providing you show up!). If you have an audit case you’d like to review with other Enrolled Agents, please let me know as soon as you can. The next meeting is on Wednesday, February 8 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

**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.
- 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 Spidell 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

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

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 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 ckdtx@aol.com

Small Group Tax Meetings
| Antioch/Brentwood | Fridays 8:00am |
| Brentwood Café, 8500 Brentwood Blvd, Brentwood |
| Ken Seamann EA | (925) 634-8297 |
| Danville Area | 4th Tue 9:30am |
| Pascals French Oven, 155 Railroad Ave, Danville |
| Michael Power EA | (510) 366-8836 |
| Oakland Area (Near BART) | 2nd Tue 8:00am |
| Buttercup Café, 229 Broadway, Oakland |
| Andy Rogers EA | (510) 332-0401 |
| Livermore Area | Fridays 8:45am |
| Shari’s Restaurant, 1116 East Stanley Blvd, Livermore |
| Jerrilynn Krebs EA | (925) 606-8181 |
| Castro Valley | 3rd Tue 8:00am |
| Carrow’s, 2723 Castro Valley Blvd @ Lake Chabot, CV |
| Dagmar Bedard EA | (510) 537-3883 |
| South Alameda County | 1st Wed 9:30am |
| Mimi’s, 24542 Hesperian, Southland Mall, Hayward |
| Sal Romo EA or Walt Thomas EA | (510) 487-1691 |

Email-only Group as needed
Send an email to halloftaxes@gmail.com
Peggy Hall EA (925) 388-1040

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

February 7: Andrew Rogers “Basic Payroll” in SF; 455 Market Street, 6th floor, 9am - 3pm; info Andy@TaxBuddha.com or (510) 332-0401

February 14: Andrew Rogers “How to Prepare Your First Schedule C” in SF; 455 Golden Gate Avenue, 6-8:30pm; info Andy@TaxBuddha.com or (510) 332-0401

February 25: Jan Zobel “Basic Tax and Recordkeeping Information for Self-Employed People”, 9:30-4pm, Oakland; info at www.JanZtax.com or Jan@JanZtax.com or (510) 482-1015

March 6: Andrew Rogers “Basic Payroll” in SF; 455 Market Street, 6th floor, 9am - 3pm; info Andy@TaxBuddha.com or (510) 332-0401
March 7: Andrew Rogers “Basic Payroll” in Oakland; 1515 Clay Street, Room 11, 2nd floor, 9 am - 3 pm; info Andy@TaxBuddha.com or (510) 332-0401

March 13: Andrew Rogers “Your First Schedule C” in Oakland; at the Women’s Institute for Self Employment, 519 17th Street, Suite 240, 4-6:30pm; info Andy@TaxBuddha.com or (510) 332-0401

Inflation has increased the level of prices in the USA +64% over the last 20 calendar years, an annual increase of +2.5%. Thus, an individual retiring on 12/31/90 on a fixed-income (i.e., with no cost-of-living adjustment) would have 61% of the purchasing power as of 12/31/10 that he/she originally had. (DOL)

Greece has the lowest credit rating (CC as ranked by S&P) of any of the 17 Eurozone countries. The yield on its 10-year government note on 1/27/12 was 33.71%. The yield on the US 10-year Treasury note on that date was 1.89%. (BTN Research)

The private research organization given the responsibility to identify the official start/stop dates of expansions and contractions of the US economy believes that our country has been in an expansionary phase since 7/01/09. That would mean that February 2012 is the beginning of the 32nd month of upward economic activity in the USA. (National Bureau of Economic Research)

HUMOR

ACTUAL PRODUCT INSTRUCTIONS:
ON CHILDREN'S COUGH MEDICINE: *Do not drive car or operate machinery.
ON NYTOL (A SLEEP AID): *Warning: May cause drowsiness.
ON A KOREAN KITCHEN KNIFE: *Warning: Keep out of children.
ON A STRING OF CHINESE CHRISTMAS LIGHTS: *For indoor or outdoor use only.
ON A JAPANESE FOOD PROCESSOR: *Not to be used for the other use.
ON SAINSBURY'S PEANUTS: *Warning: contains nuts
ON AN AIRLINE PACKET OF NUTS:
*Instructions: open packet, eat nuts.
ON A SWEDISH CHAINSAW: *Do not attempt to stop chain with your hands.
ON HAIRDRYER: *Do not use while sleeping.
ON A BAG OF FRITOS: *You could be a winner! No purchase necessary. Details inside.
ON A BAR OF DIAL SOAP: *Directions: Use like regular soap.
FROZEN DINNER SERVING SUGGESTION:
*Defrost.
ON A HOTEL-PROVIDED SHOWER CAP IN A BOX: *Fits one head.
ON TIRAMISU DESERT: *Do not turn upside down. (Printed on the bottom of the box.)
ON MARKS & SPENCER BREAD PUDDING: *Product will be hot after heating.
ON PACKAGING FOR A CLOTHES IRON: *Do not iron clothes on body.

CALENDAR OF EVENTS

February 2012
8 Audit & Representation group meeting
  @ Millie’s Kitchen, 1018 Oak Hill Rd, Lafayette
15 EBAEA Dinner Meeting: “FTB Tax Panel”
  @ Holiday Inn, Dublin
29 CSEA SuperSeminar early discount deadline

March 2012
2 TAX HELP DAY
  @ Oakland Women’s Initiative, Oakland
21 EBAEA Dinner Meeting: “IRS Tax Panel”
  @ Holiday Inn, Dublin

April 2012
No dinner meeting – it would disturb your nap!

May 2012
14 CSEA TaxTech conference
  @ Bally’s Las Vegas, NV
15-17 CSEA SuperSeminar
  @ Bally’s Las Vegas, NV
16 EBAEA Dinner Meeting: “tba” – Alan Pinck
  @ Holiday Inn, Dublin
31-6/2 CSEA SuperSeminar
  @ Grand Sierra Resort, Reno, NV

June 2012
21 EBAEA Dinner Meeting: “Hidden Tax Strategies”
  @ Holiday Inn, Hegenberger Rd, Oakland

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

Communication Committee, (1st VP)  
   Chair: Andy Rogers EA  510-332-0401  
   Bulletin: Duncan Sandiland EA, etc  800-617-1040  
   Disaster Services: Janet Bridges EA  510-505-0818  
   Legislative: Morris Miyabara EA  650-867-4507  
   Membership: Peggy Hall EA  925-388-1040  
   Membership: Gail Nanbu EA  925-943-3993  
   Practice Preservation: Linda Fox EA  925-846-5913  
   PIA: Eva Konigsberg EA  510-928-5067  
   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  510-537-3883  
   Financial Review: Tim Hintzoglou EA  925-930-7737  
   Nominating: Thomas Johnston EA  925-828-4500  
   Volunteer Coordinator: Gail Nanbu EA  925-943-3993

EAST BAY ASSOCIATION OF ENROLLED AGENTS  
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(800) 617-1040 or (510) 487-2063  fax (510) 487-1501  email: ebea@ebaea.org