November Meeting

Wed, November 28, 2012

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

4:30 Board Meeting
6:15 Networking
6:45 Dinner Buffet
7:30 Program: “Ask the Attorney”

Cost: $35.00 with reservation by Friday November 23
$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.

November Topic: “Ask the Attorney”

Speaker: Frank Acuna, Esq.
by Irene Moore, EA Program Chair

If you had free time with an attorney, and lots of questions about business law, what would you ask him or her? Consider this a free consultation with an experienced business lawyer. We will explore choice of business entity, maintaining corporate protection, employment law, privacy issues, noncompete agreements – whatever you want to discuss!

Attorney Frank Acuna has been providing informative, useful and enjoyable discussions to tax professionals for well over a decade. He has presented numerous times at EBAAEA, SuperSeminar, NTPI, and other prestigious events, on topics as diverse as estate and trust planning, bankruptcy, real estate law, business law, business entities, and several others.

In order to allow Frank to incorporate your questions into his presentations, please email them to the Chapter Office by Friday, November 23.

November Meeting Change

Do you want to come to a dinner meeting the night before Thanksgiving? Neither do we, so the November meeting has been MOVED BACK ONE WEEK to November 28, 2012, at the usual time in Dublin. No fair bringing leftovers!

President's Message

by Andrew Rogers, EA

I’m just back from teaching tax preparers in Florida for a week. In response to the question “How many have clients who are victims of identity theft” 50 out of 50 and 75 out of 75 said “yes.” I was surprised how pervasive this problem is. Maybe it’s particularly bad in Florida, but it seemed like we should know about some things we can do for our clients and ourselves.

There are some standards for tax practitioners to safeguard taxpayer information. IRS Publication 4557 Safeguarding Taxpayer Data has a checklist of things to do. Particularly with the Return Preparer Visitation Project where the IRS might visit you to ensure you’re following all the guidelines, it might be good to have gone through the checklist in advance. Protecting our client’s information is serious business, even if we’re not visited by the IRS. In my office, client files are in locked cabinets, in a locked office with an alarm, across the street from the police station, in Alameda, an area known for its low crime rate. For the computer files, the computer has a password, and files are encrypted.

If your client is the victim of identity theft, the place to start is www.IRS.gov/identitytheft. The IRS is trying to find identity theft, and some indicators are multiple returns from the same taxpayer, multiple W-2s from the same employer, or W-2’s from an unknown employer. If the IRS suspects identity theft, they will automatically delay any refund by 75 days, and ignore the POA until they can verify identity with the taxpayer directly.

Your client may receive a Letter 4883C to call in and identify themselves to the IRS, and this is a legitimate contact (see IMRS May 2012 for more info). This
is as opposed to emails from irs.COM or emails saying your EFTPS payment has some problem, if only you’d log in via the email link and enter your bank account information (if you or your client get these, forward to phishing@irs.gov).

Now that all tax preparers who file 1040 and employment tax returns (among others) need a PTIN, I’m growing concerned about someone spoiling my PTIN. In the past, I’ve included my PTIN and other info in some of the examples I’ve presented in seminars I’ve given, never thinking it might have ‘street value.’ Although the IRS seems less concerned about this variety of preparer fraud, in “Tax Notes Today” from June 21, 2012, David Williams (former head of RPO), says starting next filing season, the IRS plans to let preparers know how many tax returns were filed with their PTINs so we can check the number against our own records to see if you think someone else is using your PTIN. No information yet about who to contact, or what to do if your PTIN has been stolen.

**QUICKFINDERS**
*by Diann Gross, EA*

Attached to this newsletter is the special EBAEA group discounted 2012 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 12/3/2012. I urge you to FAX your credit card orders or mail check orders early using the special code: Q521 on the new QUICKFINDER order form attached to this newsletter. Call me at (925) 736-3853 voice or fax with any questions.

**CSEA POLITICAL ACTION COMMITTEE**
*by Lonnie Gary, EA*

The CSEA PAC is a nonpartisan, general purpose political action committee which is funded through voluntary member contributions. The PAC supports candidates for statewide office who promote legislation favorable to Enrolled Agents and taxpayers.

The CSEA PAC announced the launch of “Club Levels” to recognize Members for their contributions. The contribution levels are:

<table>
<thead>
<tr>
<th>Level</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Governor Level</td>
<td>$300</td>
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<tr>
<td>Senate Level</td>
<td>$200</td>
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<tr>
<td>Assembly Level</td>
<td>$100</td>
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<tr>
<td>District Level</td>
<td>$50</td>
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<tr>
<td>Constituent Level</td>
<td>$5</td>
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</tbody>
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Members who contribute to any level will receive a new lapel pin. Members who contribute to any of the “Elite Levels” (District, Assembly, Senate or Governor) also receive a lanyard/badge that corresponds to their level of support.

On September 21st, “Elite Level” contributors were treated to a PAC reception in Sacramento following the State Tax Liaison Meeting. Attendees networked with special guest Jim Nielsen, Vice Chair of the Assembly Budget Committee, and a member of the Appropriations, Veterans Affairs, and Rules Committees.

If you missed the September PAC event, you’ll have another opportunity in January in conjunction with the Jim Stern Legislative Day event. It’s easy to contribute to the CSEA PAC. Click here to make a contribution online.

**YOUR MEMBERSHIP/YOUR ASSOCIATION**
*by Gail Nanbu, EA*

What does your membership in EBAEA mean to you? What do you get out of it? What don’t you get out of it? Is there another organization that gives you as an EA something you don’t get from EBAEA or CSEA? What can we do to make EBAEA better for you?

These are some questions being asked not only at our local Chapter level, but also at the state CSEA level. Kim Kastl, EA, is the Chair of the newly formed CSEA Growth Initiative Task Force (GITF). GITF is a think tank created to generate new ideas and perhaps revisit old ideas which will help drive CSEA, and therefore EBAEA, forward in terms of increased membership and financial stability. If you have any ideas for Kim, email her at kim4ea@yoursecuretaxes.com.

Obviously, this is not just a state issue. It is a local issue, and we invite your comments (positive and negative) and ideas for making EBAEA a meaningful association for YOU. Email me at gail@pgnea.com.

**MEMBERSHIP HIJINKS**
*by Peggy Hall and Gail Nanbu, Membership CoChairs*

Membership and PIA often overlap in their activities, and certainly overlap in their objectives – that is, to tell the world who we are and how we can help everyone! October was one of those months in which the two Committees came together to function as one. Peggy Hal, EA set up our “Booth in a Box” at the St. Mary’s College Gaelebration (to celebrate its 150th Anniversary) in Moraga. Michael Power, EA, Aida Torres, EA, and Gail Nanbu, EA joined her in proclaiming the virtues of EAs to all within hailing distance. It’s amazing how many people have no idea what an EA is, what they do or what they stand for. We handed out brochures, EBAEA Post-its, and CSEA pens; and enlightened one and all!

We hope all attendees at the last dinner meeting on October 17 enjoyed our “Thank Goodness It’s Over” celebration, where the Committee provided wine for every table in appreciation for supporting EBAEA.

Remember, if you have any thoughts about your membership in EBAEA/CSEA and how it can better serve you, let us know by emailing me at gail@pgnea.com.
“DISSECTING AN ENGAGEMENT LETTER”  
A Practice Management Mini-Seminar  
Saturday, Nov 10, 1pm - 2:30pm  
The speakers from our August dinner meeting, attorneys Janet Everson and Jason Galek, are presenting a follow-up discussion of tax practice engagement letters. Typical items found in standard engagement letters will be examined. While there are limits on specific legal advice that can be provided in this setting, every effort will be made to address questions submitted in advance.

Location:  
EBAEA Chapter Office  
30100 Mission Blvd, Suite 6  
Hayward CA 94544  
Phone: 800-617-1040  
Sign-up will be through the normal web site process:  
https://www.123signup.com/calendar?Org=ebaea  
Cost is $15 per attendee to cover room and materials. Attendees will be eligible for 1 hour of practice management CE (good for meeting NAEA 30-hr annual requirement). Limit of 12 attendees due to room size; if there is excess demand, a second session in Walnut Creek may be scheduled.

Please contact Mark Bole, mini-seminar chairperson, at mark@MarkBoleTax.com for more information or with advance questions.

DINNER MEETING CE INFORMATION  
• IRS Program Number: WZAO9-T-00243-12-I  
• Qualifies for 1 Hour Federal Tax Law Update  
• CTEC Course # 1001-CE-7260 Federal 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).

DISCHARGING TAXES IN BANKRUPTCY:  
Mini-Seminar Report  
This is a thank you to attorney David Arietta for his informative discussion of bankruptcy and taxes at our recent mini-seminar on Thursday evening, October 18 in Walnut Creek. This seminar was presented at no cost to the attendees or the chapter through the generous effort of David. On behalf of the attendees, we appreciate the time taken by David to answer our questions. You can find out more about Mr. Arietta and his practice at http://www.ariettalaw.com.

If anyone would like a follow-up, please contact David directly through his website. Contact Mark Bole, EA with any questions or concerns about the EBAEA mini-seminar program at mark@MarkBoleTax.com.

HAIL TO THE CHIEF!  
Lonnie Gary, EA, USTCP (past EBAEA President and past CSEA president) has been nominated for the office of President-Elect of NAEA for the 2013-2014 term. Vote early and often!

WELCOME NEW MEMBERS  
We welcome the following new Member:  
Varinder Pal Singh, EA  
If you have just joined and you name is not listed, contact Gail gail@pgnea.com.  
All new members and professional associates will receive a packet from CSEA. All new EA members will receive a packet and certificate from EBAEA. If you are a new EA member and haven’t received a packet from Peggy and Gail, please let us know.

CSEA digitAX SCHEDULE  
Once again, CSEA is sponsoring a series of webinars to give you a chance at very specialized knowledge that is otherwise very hard to come by. The price is very reasonable and you never have to leave your office (or your home). Check the CSEA website for all the fine details.

Nov 7  Foreign Tax Issues for US Citizens  
Dec 5  Domestic Tax Issues for Non-Resident Aliens

EBEA EA EMAIL LISTS  
EBEA EA 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

BOGUS IRS EMAILS?  
The following message was recently sent out over the EBAEA NEWS email list. If you subscribe to that list, you received this notice over a week ago. If you did not get this notice, go to the paragraph directly above this one, click on the link, and subscribe now. Here’s what you missed:

The IRS recently began sending email to current PTIN holders, reminding them to renew. Those emails were sent from an address with a .com suffix (as opposed to .gov), leading some recipients to be concerned that it was a phishing scam. All IRS subscriptions are sent from irs@service.govdelivery.com. This is a valid IRS email message, not a scam.
**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. 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.

**PITNEY BOWES POSTAGE MACHINE**

Enjoy the convenience of putting the correct postage on your mass mailings in your office. Assume lease through April 2014. $135.31 quarterly plus supplies and $15 yearly personal property tax. EA retiring. Call Tom at 925-828-4500 or taxtomea@comcast.net.

**PRACTICE WANTED**

Enrolled Agent looking to purchase a small to medium-sized tax practice specializing in individuals. I’m not currently looking to purchase a heavy bookkeeping or accounting component. East Bay location is preferable, but if the right practice is available, location is a secondary criteria. Willing to partner with a practitioner looking to transition their business within 1-2 years. Financing and terms are flexible. Call Neil Narvaez at 510-299-4454, or email neil.1972@yahoo.com.

**HELP AVAILABLE**

EA candidate (currently CTEC) seeks seasonal or year-round tax prep position. MBA with systems analyst and technical writer background has strong interviewing, research, analysis, writing and presentation skills and can provide help with business plans, proposals, marketing communications and web site content to your clients with those needs. Experience with UltraTax and QuickBooks, some exposure to Lacerte, strong MS Office and other software skills. Prefer Walnut Creek area but can commute. Contact Pat at (925) 998-5725.

**HELP WANTED**

Busy Pleasanton office looking for an EA or licensed tax professional with several years experience in tax and Lacerte. Please send a cover letter and resume with references to: info@cataxservices.com.

**HELP WANTED**

Small San Ramon CPA tax practice is seeking a first or second year EA (or candidate) to input (mostly) individual tax returns mid-January through mid-April. It is hoped that the EA filling this position will return seasonally for about a 3 year period. The CPA will help the right EA learn tax code application as well as assisting in the growth of their own practice in exchange for their diligence and determination. Compensation is commensurate with ability. Please email cover letter and resume to dave@deponceau.com.

**Small Group Tax Meetings**

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<tr>
<th>Area</th>
<th>Day</th>
<th>Time</th>
<th>Venue</th>
<th>Contact</th>
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<tbody>
<tr>
<td>Antioch /Brentwood</td>
<td>Fri</td>
<td>8:00am</td>
<td>Brentwood Café, 8500 Brentwood Blvd, Brentwood</td>
<td>(510) 634-8297</td>
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<tr>
<td>Ken Seamann EA</td>
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<tr>
<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>4th</td>
<td>9:00am</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>Fri</td>
<td>8:45am</td>
<td>Shari's Restaurant, 1116 East Stanley Blvd, Livermore</td>
<td>(925) 606-8181</td>
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<tr>
<td>Jerrilynn Krebs EA</td>
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<tr>
<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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<tr>
<td>Dagmar Bedard EA</td>
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<tr>
<td>South Alameda County</td>
<td>1st Wed</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>
<td>as needed</td>
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<td>Email-only Group</td>
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<td></td>
<td>Send an email to <a href="mailto:halloftaxes@gmail.com">halloftaxes@gmail.com</a></td>
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<tr>
<td>Peggy Hall EA</td>
<td></td>
<td></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

Nov 6: “Basic Payroll” in San Francisco, 9am-3pm, Andy Rogers, Andy@TaxBuddha.com

Nov 9: “QuickBooks and 351 Exchanges for Corporations” for CSATP in Sacramento, 9am-3pm, Andy Rogers, Andy@TaxBuddha.com
Nov 12-17: “Federal Tax Update”, “Ethics”, and “Federal Tax Matters” in various Kansas and Missouri locations, Andy Rogers, Andy@TaxBuddha.com

Nov 28: “Basic Payroll” in Oakland, 9am-3pm, Mark Bole, mark@MarkBoleTax.com

Dec 4: “Basic Payroll” in Concord, 9am-3pm, Mark Bole, mark@MarkBoleTax.com

**CALENDAR OF EVENTS**

**November 2012**

1,2,3 EBAEA TaxTalk annual seminar
@ Holiday Inn, Dublin

7 CSEA digiTAX: Foreign Tax for US Citizens

10 EBAEA miniseminar: “Engagement Letters”
@ Chapter Office, Hayward

17 Audit & Representation Group
@ Millie’s Café, Lafayette, 9:30-11:30am

28 EBAEA Dinner Meeting: “Ask the Attorney”
@ Holiday Inn, Dublin

**December 2012**

5 CSEA digiTAX: Domestic Tax Issues for Non-Resident Aliens

19 EBAEA Dinner Meeting: “Ethics” 2 hours
@ Holiday Inn, Oakland

**January 2013**

16 EBAEA Dinner Meeting: “Iba”
@ Holiday Inn, Dublin

**HUMOR**

Mitsy and Melda were talking about their grandchildren after the holidays. Mitsy said, “My daughter-in-law stopped making my grandchildren send their ‘thank you’ notes. Each year I sent the grandchildren a card with a generous check inside. I always received a lovely ‘thank you’ note. However, since my daughter-in-law stopped making the grandkids send thank you notes, I never hear from them.” Milda said, “My daughter-in-law never made the grandchildren send ‘thank you’ notes. I too send them a very generous check. However, for the past several years, I hear from them within a week after they receive it. In fact, they each pay me a personal visit.”

“Wow,” remarked Mitsy. “I wish mine would do that.”


Little Billy badly wanted $100, so he prayed for two weeks but nothing happened. Then he decided to write God a letter requesting the $100. When the postal authorities received the letter addressed to God, USA, they decided to send it to the President. The President was so impressed, touched and amused that he instructed his secretary to send Billy a $5 bill, which should appear to be a lot of money to a little boy. Billy was delighted with the $5 and sat down to write a thank you note to God, which read: “Dear God Thank you very much for sending the money, however, I noticed that for some reason you had to send it through Washington D.C. and, as usual, those crooks deducted $95.”

A family took their frail, elderly mother to a nursing home and left her, hoping she would be well cared for. The next morning, the nurses bathed her, fed her a tasty breakfast, and set her in a chair at a window overlooking a lovely flower garden. She seemed okay, but after a while she slowly started to tilt sideways in her chair. Two attentive nurses immediately rushed up to catch her and straighten her up. This went on all morning. Later, the family arrived to see how the old woman was adjusting to her new home. “Ma, how is it here? A patient was at her doctor’s office after undergoing a complete physical exam. The doctor said, “I have some very grave news for you. You only have six months to live.” The patient asked, “Oh doctor, what should I do?” The doctor replied, “Marry an accountant.” “Will that make me live longer?” asked the patient. “No,” said the doctor, “but it will SEEM longer.”

The US government’s annual budget deficit has increased more than 8 times in just the last 5 fiscal years. Our actual budget deficit was $161 billion in fiscal year 2007. Our projected budget deficit for fiscal year 2012 is $1.327 trillion. (White House)

22% of the spending of the average US state is for Medicaid expenditures. (National Association of State Budget Officers)

In 1880 (132 years ago), 72% of Americans lived on farms. In 1920 (92 years ago), 50% of Americans lived on farms. Today, just 2% of Americans live on farms. (SSA, EPA)

On 8/13/79, BusinessWeek’s cover story was titled “The Death of Equities” and the S&P 500 closed at 107. The index closed at 1406 on 8/10/12. (BusinessWeek)
2012 - 2013 Board of Directors and Committee Chairs

President: Andy Rogers EA 510-332-0401  PIA: Peggy Hall EA 925-388-1040
1st VP: Gail Nanbu EA 925-943-3993  Quickfinders: Diann Gross EA 925-736-3853
2nd VP: Eva Konigsberg EA 510-928-5067  Social Affairs: Dan French 510-299-2764
Treasurer: Marjorie Williams-Jones EA 510-482-6204  Website: Eric Rheinheimer EA 510-893-3601
Secretary: Carrie Kroeger EA                      IRS Practitioner Panel: Phil Fiegler EA 510-530-1174

Director 2012-2013:
  Mark Bole EA  925-287-0366
  Irene Moore EA  510-791-8962x16
  Sal Romo EA  510-471-9492
Director 2012-2014:
  Clare Ashby EA
  Jan Bridges EA  510-505-0818
  Al Wise EA
CSEA Director: Gail Nanbu EA  925-943-3993

Communication Committee, (1st VP)
Chair: Gail Nanbu EA  925-943-3993
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

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
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
30100 Mission Blvd, Suite 6, Hayward CA 94544
(800) 617-1040 or (510) 487-2063  fax (510) 487-1501  email: ebaea@ebaea.org
"DISSECTING AN ENGAGEMENT LETTER"
A Practice Management Mini-Seminar

Saturday, Nov 10, 1pm - 2:30pm

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Please contact Mark Bole, mini-seminar chairperson, at mark@MarkBoleTax.com for more information or with advance questions.
Mayonnaise Jar & Two Beers

When things in your life seem almost too much to handle, when 24 hours in a day are not enough, remember the mayonnaise jar and the two beers.

A professor stood before his philosophy class and had some items in front of him. When the class began, he wordlessly picked up a very large and empty mayonnaise jar and proceeded to fill it with golf balls. He then asked the students if the jar was full. They agreed that it was.

The professor then picked up a box of pebbles and poured them into the jar. He shook the jar lightly. The pebbles rolled into the open areas between the golf balls. He then asked the students again if the jar was full. They agreed it was.

The professor next picked up a box of sand and poured it into the jar. Of course, the sand filled up everything else. He asked once more if the jar was full. The students responded with a unanimous “yes”.

The professor then produced two beers from under the table and poured the entire contents into the jar, effectively filling the empty space between the sand. The students laughed. “Now,” said the professor as the laughter subsided, “I want you to recognize that this jar represents your life. The golf balls are the important things: your family, your children, your health, your friends and your favorite passion. If everything else was lost and only they remained, your life would still be full. The pebbles are the other things that matter like your job, your house and your car. The sand is everything else---the small stuff.

“If you put the sand into the jar first,” he continued, “there is no room for the pebbles or the golf balls. The same goes for life. If you spend all your time and energy on the small stuff you will never have room for the things that are important to you. Pay attention to the things that are critical to your happiness:

Spend time with your children.

Spend time with your parents.

Visit with grandparents.

Take your spouse out to dinner.

Play another 18 holes of golf.

There will always be time to clean the house, fix the disposal or deal with things from your job.

Take care of the golf balls first - the things that really matter.

Set your priorities.

The rest is just sand.”

One of the students raised her hand and inquired what the beer represented. The professor smiled and said, “I’m glad you asked.” The beer just shows you that no matter how full your life may seem, there’s always room for a couple of beers with a friend.
QUICKFINDER HANDBOOKS

NEW! 1040 Quickfinder® Handbook — Registered Tax Return Preparer Edition
The 1040 Quickfinder Handbook RTRP Edition includes all of the same great content as the traditional 1040 Quickfinder Handbook plus two additional tabs. You’ll get all the tax quick reference material you need when preparing Form 1040 plus important information on the evolving rules and requirements for RTRPs. And now that all paid tax return preparers are subject to IRS Circular 230, you’ll have it at your fingertips along with insights into its key provisions and rules.

NEW! Premium Quickfinder Handbook — Registered Tax Return Preparer Edition
The Premium Quickfinder Handbook RTRP Edition includes all of the same great content as the traditional Premium Quickfinder Handbook plus two additional tabs. You’ll get all the tax quick reference material you need to complete tax returns for individual and businesses plus great important information on the evolving rules and requirements for RTRPs. And now that all paid tax return preparers are subject to IRS Circular 230, you’ll have it at your fingertips along with insights into its key provisions and rules.

1040 Quickfinder Handbook
The 1040 Quickfinder Handbook has over 300 pages covering everything you need to know to prepare federal individual income tax returns. Our accurate, easy-to-read content is an industry leader for independent tax professionals.

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.

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.

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!

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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!

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All the important, relevant information on IRAs and retirement plans, and loads of tables and checklists, with information on: IRAs, SEPs, SIMPLE IRAs, 401(k) plans, and other employer plans; choosing and operating a plan and complying with IRS requirements; and account distributions, rollovers, and beneficiaries.

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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.

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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 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.

Tax Tables for Individual Returns and Tax Tables for Business Returns
These durable, laminated fold-out tools provide the Quickfinder tables and charts you use most often, allowing you to quickly answer client questions without flipping through pages.

QUICKFINDER SELF-STUDY CPE

Ethics and Responsibilities of Tax Professionals
Understand rules and regulations governing the tax profession and the practical application of these rules, Meets the 2-hour ethics course requirement for EAs! (CPAs please consult your state’s requirements to determine if our course qualifies in your state.)
Company Name
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City, State, ZIP
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All products are shipped UPS Ground or USPS. Quickfinder products are shipped on a first-in, first-out basis, so the earlier you place your order, the sooner you will receive it!
Big Valley Chapter of CSEA
Presents
Tax Practice Management Workshop (TPMW)
8:00AM – 6:00 PM Friday December 7, 2012
8:00AM – 5:00 PM Saturday December 8, 2012
Willson & Company, 612 West Eleventh St., Ste 101,
Tracy, CA 95376

Whether you have been in practice for years, or are just starting out, this workshop will give you real world examples and practical tools that will help your practice meet your firm’s changing and challenging demands. To succeed in today’s marketplace, your practice must have a range of expertise including:

- Strategic decision making process required to start your business
- Techniques to effectively leverage growth opportunities to maximize potential
- Sharpen and expand your practice management knowledge to elevate your practice to a new level

This intensive 2 day workshop will teach you how to write a business plan, hire and train employees, handle ethical dilemmas, market your practice, streamline office procedures, utilize technology most effectively, and manage your time to your advantage.

WHO SHOULD ATTEND

Anyone starting a practice, expanding their practice or selling their practice should attend. It’s also a benefit to any practitioner who manages a practice.

CPE Offered: CSEA/NAEA 16 hours, plus IRS: ethics 2 hour Total 18 hours

Cost: Members: $375 before Nov. 23, $425 after Nov. 23
   Nonmembers: $425 before Nov. 23, $475 after Nov. 23
Cost includes 2 continental breakfasts, 2 lunches, and 1 dinner

REGISTRATION FORM

Mail completed form to: Big Valley Chapter PO Box 850 Soulsbyville CA 95372-0850

Please complete a separate form for each participant
Name:_____________________________________
Company:____________________________________
Address:_____________________________________
City:__________________State:_____ZIP:___________
Phone:(______)__________Fax*(______)__________
*Email Address:_________________________________
*Fax # or Email Address required for registration confirmation,

How did you hear about the event?_________________________________

For CPE Credits please provide the following:
EA#________________ CPA#_________________ BAR#_________________
CTEC#________________ PTIN________________

Credit Card Payment is Preferred
Or use Your ATM Card with VISA/MasterCard logo through secure online payment processing at:
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Payment: (Includes 2 Continental Breakfasts, 2 Lunches & 1 Dinner

☐ Early Bird - $375 Member $425 Nonmember
☐ After Nov 23 $425 Members $475 Nonmembers

USE THIS FORM ONLY IF PAYING BY CHECK

☐ Registration & Check are enclosed
☐ Check only is enclosed

Make check payable to: Big Valley Chapter

Registration 7:30 AM / Workshop 8 AM to 6 PM Friday and 8 AM to 5 PM Saturday