NEXT MEETING Wed, November 20, 2013
Place: DUBLIN Holiday Inn (ex-Radisson)
(go to http://www.holidayinn.com/hotels/us/en/dublin/dubrm/hoteldetail#Directions, or take BART!)

4:30 Board Meeting
6:15 Networking
6:30 Dinner Buffet
7:10 Program: “FTB Representation”

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

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

November Topic: “Crash Course in FTB Representation” – 2 hours
Speaker:
by Peggy Hall, EA  Program Chair

Brenda Voet of the Franchise Tax Board Taxpayer's Advocate Office will be speaking to us about all aspects of representation involving the FTB. Topics will include FTB’s annual audit program, protest and appeal processes, audit issues, credits, withholding requirements, FIRM and the innocent spouse program.

Brenda will give an overview of FTB’s collection process, including billings, liens, collection actions, FTB eservices and the role of the FTB’s Taxpayers’ Advocate. Yes, this is a lot of valuable information delivered by an “insider.” Those who attended CSTAR in Sacramento last month received this information over 3 days; there is a lot of information for the price of one dinner meeting!

Brenda Voet has been with the FTB for more than 25 years. Prior to becoming a technical assistant to the Taxpayers’ Advocate, she worked in the Public Affairs Office for two years and more than 20 years as an auditor, hearing officer, and subject matter expert with the FTB. Brenda has worked in various audit programs including taxation of California non-residents, and flow-through entities.

PRESIDENT’S MESSAGE
by P. Gail Nanbu, EA

What is an EA?

“I’m with my ‘accountant’ (or ‘CPA’), and she needs some information for my tax returns.” This is courtesy of Linda Koziol, EA; but of course, we ALL hear this all the time, or at least on any day in which we have client or business interaction. Oftentimes, when this occurs, I will say or “mouth” to my client, “EA!!” But in the heat of the tax battle, the client will not remember the gentle reminder of who we are.

Would you believe that last month my own brother asked me what an EA is, and what do EAs have to do with taxes?!!? Our professional reputation doesn’t necessarily hang on the alphabet that follows our name, but wouldn’t it be wonderful to be recognized as an Enrolled Agent and for all that EAs stand?

Meeting, networking and working with fellow EAs at the local, regional and state levels reinforce daily my strong belief that the EAs with whom I interact are not only ethical, hard-working, and supportive; but always ready to share their knowledge and expertise with other EAs. I see this at the national level, at the state level, at the regional level, and, of course, locally in our own Chapter.

Today, radio station 92.1 KKDV aired a live interview broadcast with members of EBAEA, courtesy of Peggy Hall, EA. Peggy spoke about the professional tax expertise of enrolled agents, and what the EA designation represents. We had the added plus of enjoying mini Bundt cakes and coffee courtesy of KKDV. Those who took part were Peggy Hall, EA; Mark Bole, EA; Monte...
Lee, EA; Mary Geong, EA, CPA; Linda Koziol, EA; Aida Torres, EA; Joanne Anderson, EA; Patty Pringle, EA; and yours truly. We had a great time not only sharing with the public the benefits of engaging EA via the radio broadcast, but also sharing common tax-related ideas with each other.

As Chapter members, we work both on a person-to-person basis and on a broader scale to educate the public about EAs. If you are asked what an EA is and you’re at a loss as to what to say, check out the brochures from NAEA and CSEA. Both have great explanations and information about EAs. Promote yourself and exclaim your expertise in all things tax. Each of us individually knows volumes of tax information, and collectively our knowledge is all-encompassing for federal and state tax!

Obviously, I need to do a lot more education on a personal level – my own brother!

**STILL TIME TO REGISTER FOR**

**“TAX TALK 2013”**

*Please see the Tax Talk 2013 flyer and registration form at the back of this Bulletin for details*

Register online at: [www.123signup.com/event?id=dfphk](http://www.123signup.com/event?id=dfphk)

This year’s Tax Talk Seminar will be held at the Holiday Inn in Dublin on November 6th, 7th, and 8th.

Once again we have lined up highest-quality speakers to present topics that are current and relevant. As tax professionals we are required to maintain our continuing education and are seeking ways to maximize our education dollar, plus get quality education. EBAEA realizes this and our Tax Talk 2013 Seminar provides up to 24 hours of CPE at an affordable cost. Topics include: Appeals (how to be more appealing to the IRS), Ethics, Cancellation of Debt (the saga continues), DOMA, Tax Law Update, Affordable Care Act and other timely topics.

Be sure to stay after the regular seminar on Wednesday for wine and cheese featuring “After Hours with FTB Taxpayer Advocate Brenda Voet”. Get your tax questions answered in a relaxed setting.

In addition to the excellent educational offerings we provide a continental breakfast, great lunch choices and afternoon snacks. No need go off site to scramble for food. Relax and enjoy networking with your colleagues. All materials and food are included in the cost of registration.

There are many advantages to attending a live seminar. You get to NETWORK with your fellow tax professionals and ask the speaker questions.

This is a Chapter sponsored event and all proceeds go back to the Chapter and are used for other special events and programs for EBAEA Membership. This event would not be possible without the hard work of the many volunteers that make it happen. Please let me know if you would like to join the fun and volunteer. Your help will be greatly appreciated!

**GET YOUR BUTT TO CLASS**

*b* Duncan Sandiland, Bulletin Editor

When I was a new EA, I attended almost every seminar I could, whether SuperSeminar, GearUp, Brass Tax, East Bay TaxTalk, NTPI, CSEA or other providers. After a short while, I decided to drop everything except classes sponsored by NAEA/CSEA/EBAEA. For quality of teaching, usability of information, and overall value, none of the others could compare.

For the last 17 years, I have been treated to the best education in the industry. Whether it was one of the now-retired old guard (Mel Kreger, Carol Thompson, Dave Gorsuch, etc), a stalwart veteran (Karen Brosi, Sharon Kreider, Vicki Mulak, Bob McKenzie, etc), or one of the new generation (Frank Acuna, Lisa Ihm, etc), every one of those speakers crammed their sessions full of lessons I needed to know but could not find anywhere else at any price.

What’s the old expression? You never know how much you’ll miss something until you can’t get it anymore?

I attended my first Texas education event this past weekend. The people were nice, the speaker was fun, the food was great, but the content just wasn’t the same. After a full day, 8 hour class covering six different major topics, I have zero client-specific notes, two minor changes to make to my organizer, and two leads for things I have to look up (the speaker only mentioned the ideas and did not provide the full details).

By comparison, I would expect to get all the above, plus 1-2 client-specific notes out of a single 2 hour class from CSEA or EBAEA. TaxTalk and SuperSeminar are unique in that they have enough support to bring in the best in the industry and still keep the price reasonable. The 35 EAs at my Texas meeting can’t match that.

I will be going to every Texas society event to meet other EAs and learn local info and techniques. But for real education, the kind that saves me hours during tax season and saves my clients thousands of dollars, I will be paying the airfare and extra hotel nights to go to SuperSeminar or TaxTalk every year. I have no choice.

**YOU DO.** Folks, you have the BEST SUBJECT MATTER EXPERTS teaching classes RIGHT IN YOUR BACKYARD. Block out the time on your calendar, pay the fees, go to classes, pay attention and take tons of notes. Review those notes immediately after class each night and then make up to-do lists from those notes. After the entire event, review your to-do lists again, and adjust your calendar for the next two weeks to fit them in. Most of the time you spend knocking things off those lists will be much higher value than what you sort-of had planned, and the revenue potential will pay back your class fees at least several times over.

You owe this to your clients, your colleagues and staff, your family, and most especially, to yourself. Challenge yourself. Be the best you can be. Go to class.
ETHICS

This year the best place to get your 2 hours of Ethics will be at East Bay TaxTalk on November 6, 7, and 8. Jennifer MacMillen will be the speaker. She makes the topic interesting. We will not be offering a separate Ethics dinner meeting so watch for the coming details and sign up for East Bay TaxTalk.

MEMBERSHIP COMMITTEE

by Aida Q. Torres EA, Membership Chair

Thanks to our membership group including Joanne Anderson, EA and Carolyn Krieg, EA for our first Membership committee meeting held at our President’s office – Patricia Gail Nanbu, EA on October 25. The meeting was the implementation of CSEA’s “Just Ask One” 2013 -2014 Membership Recruitment Challenge, as presented to all the Chapters by Membership Committee Webinar.

The Just Ask One Membership Campaign is asking every member in every Chapter to reach out to one EA and invite them to become part of our professional community. From this year forward, our goal is more than simply increasing our numbers. We are interested in building a professional membership community that focuses attention on helping every member discover how to make the most of their membership, and at the same time, having members contribute their knowledge and expertise to advance our profession here in California.

We will be asking volunteers through email for follow-up “Caller” and volunteers to “Welcome” new EAs to our chapter on one to one basis! Together, we’re going to make great things happen for our members and our profession!

WELCOME NEW MEMBERS

We welcome the following new members:

<table>
<thead>
<tr>
<th>Enrolled Agents:</th>
<th>Join Date</th>
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<tbody>
<tr>
<td>Mons Cedercreutz, EA</td>
<td>10/22/13</td>
</tr>
<tr>
<td>Gayb G. Guillermo, EA</td>
<td>10/01/13</td>
</tr>
<tr>
<td>Veronica Herrera, EA</td>
<td>10/22/13</td>
</tr>
<tr>
<td>Pamela K. Marks, EA</td>
<td>09/05/13</td>
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<tr>
<td>Darrell Kevin Walters, EA</td>
<td>08/05/13</td>
</tr>
<tr>
<td>Phillips P. Yee, EA</td>
<td>10/04/13</td>
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</table>

If you have just joined and your name is not listed, please email me at aid@aidatorres.com. All new members and professional associates and professional affiliates 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 the membership committee, please let us know.

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 November or 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.

DINNER MEETING CE INFORMATION

“FTB Representation”, 11/20/13
- IRS Program Number: (no IRS credit for this)
- Qualifies for 1 hour of Federal Tax Law Topics
- CTEC Course #1001-CE-0433 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).

EAs AVAILABLE TO SPEAK

Although our speaker’s development group has been dormant this year, there are still a number of chapter members who welcome the opportunity to speak to the public on a variety of tax topics. If you know of a group that would like a guest speaker, please contact Andy Rogers, EA, or Mark Bole, EA for suggestions.

2013 CSEA digiTAX SCHEDULE

Looking for a bite-sized chunk of high-quality info on a subject? Grab your calendar, look over this list and mark the ones that sound tasty. Then head over to www.csea.org to sign up.

Nov 6: Form 709: Gift Tax Return
Nov 13: Form 706: Estate Tax Return
Nov 20: Wealth Transfer Taxes
Dec 11: Handling Complex IRS Examinations: Domestic and International
Jan 15: Representing Audits in Today’s Environment

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

MEMBERS SPEAK

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

Nov 13: San Francisco Payroll Tax Class, 455 Market Street, 9 am - 3 pm Andy@TaxBuddha.com
Dec 3: San Francisco Payroll Tax Class, 455 Market Street, 9 am - 3 pm Andy@TaxBuddha.com
**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.

**TAX PROFESSIONAL WANTED**

A well established, respected leader among public accounting firms in Walnut Creek is searching for a full-time experienced tax professional. EA or CPA required. Minimum 3-5 years of tax experience in the public accounting arena including trial balance and strong communication skills are required. See full job posting on our website at www.bprh-cpa.com or send resume along with references and salary requirements to jobs@bprh-cpa.com Reference JOB1

**EA WANTED**

Fremont firm looking for a year-round, part-time tax professional to start with our team. Minimum 3 years experience preparing and reviewing individual, corporate, LLC and partnership returns required. Must be experienced in QuickBooks and the use of tax software. Enrolled Agent with degree preferred. View our website at www.TotalBizCare.com Please send resume to info@totalbizcare.com. Please feel free to call our office (510) 797-8375 if you have questions.

**CASTRO VALLEY OFFICES**

Beautiful space available in an 1860 farm house converted to offices. This historical landmark is known as Stanton House and is located across from McDonald's at the west end of town. Very cozy office, perfect for therapists or professional services, such as accountants, lawyers, engineers, or architects. All offices are a one year lease and then month to month. Rent includes utilities, monitored security system, and janitorial services for the common areas. There are two restrooms in the building, one on each floor. All tenants have access 24/7.

Suite E is located on the second floor and has 2 rooms with a large closet in each. The front room is 12½’ x 14½’ and the interior room is 12’ x 14’. Rent is $1,000/month.

Suite B is on the first floor and measures 14½’ x 15’. Rent is $650/month.

Suite C is also on the first floor, measures 13½’ x 15’, and has a closet for storage. Rent is $600/month. Call Diane Jaworski-Faulhaber 510-538-048 or email synergyf@pacbell.net.

**Small Group Tax Meetings**

<table>
<thead>
<tr>
<th>Location</th>
<th>Date and Time</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>
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<tr>
<td>Ken Seamann EA</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>
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<tr>
<td>Michael Power EA</td>
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<tr>
<td><strong>Oakland Area (Near BART)</strong></td>
<td>4th Tue 9:00am</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><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>
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<tr>
<td>Jerrilynn Krebs EA</td>
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<tr>
<td><strong>Castro Valley</strong></td>
<td>3rd Tue 8:00am</td>
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<tr>
<td>Carrow’s, 2723 Castro Valley Blvd @ Lake Chabot, CV</td>
<td>(510) 537-3883</td>
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<tr>
<td>Dagmar Bedar EA</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>Mimi’s, 24542 Hesperian, Southland Mall, 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><strong>Email-only Group</strong></td>
<td>as needed</td>
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<tr>
<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>(925) 388-1040</td>
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**CALENDAR OF EVENTS**

**November 2013**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>6,7,8</td>
<td>EBAEA TaxTalk seminar</td>
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<tr>
<td>@ Holiday Inn, Dublin</td>
<td></td>
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<tr>
<td>20</td>
<td>EBAEA Dinner Meeting: “FTB Representation”</td>
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<tr>
<td>@ Holiday Inn, Dublin</td>
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**December 2013**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>18</td>
<td>EBAEA Dinner Meeting: &quot;Stock Options&quot;</td>
</tr>
<tr>
<td>@ Holiday Inn, Oakland Airport</td>
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</tbody>
</table>
**HUMOR**

Computers are like men. In order to get their attention, you have to turn them on. They are supposed to help you solve problems, but half the time they are the problem. They have a lot of data but are still clueless. As soon as you commit to one, you find you are stored in long term memory for later retrieval. As things go on, you have to turn them on. They are supposed to help you solve problems, but half the time they are the problem. As soon as you commit to one, you find you are stored in long term memory for later retrieval. As things go on, you have to turn them on. They are supposed to help you solve problems, but half the time they are the problem.

Computers are like women. No one but the Creator understands their internal logic. The native language they use to communicate with other computers is incomprehensible to everyone else. Even your smallest mistakes are stored in long-term memory for later retrieval. As soon as you make a commitment to one, you find yourself spending half your paycheck on accessories for it. You do the same thing for years, and suddenly it’s wrong.

The teacher said; “Tommy, this is the fifth day this week you’ve had to stay after school. What have you to say for yourself?” “I’m certainly glad it’s Friday,” said Tommy.

“What am I supposed to do with this?” grumbled the motorist as the police clerk handed him a receipt for his traffic violation. “Keep it,” the clerk advises. “When you get four of them, you get a bicycle.”

A man called his law firm and asked the receptionist if he could speak to his lawyer, Mr. Smith. She replied that she was sorry, but his lawyer was dead. The next day the man called again wanting to speak with Mr. Smith. The receptionist again said that she was sorry, but he was dead. The next day, the man rang again and asked if he could talk to his lawyer Mr. Smith. The receptionist said that she was sorry but she had already told him a hundred times that he was dead. The man replied, “I know that, I just like hearing it!”

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<table>
<thead>
<tr>
<th>2013 - 2014 Board of Directors and Committee Chairs</th>
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<tr>
<td><strong>President:</strong> P Gail Nanbu EA</td>
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<tr>
<td><strong>1st VP:</strong> Al Wise EA</td>
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<td><strong>2nd VP:</strong> Aida Torres EA</td>
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<td><strong>Treasurer:</strong> Tim Hintzoglou EA</td>
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<td><strong>Secretary:</strong> Carrie Kroeger EA</td>
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<td><strong>Immed Past Pres:</strong> Andy Rogers EA</td>
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<td><strong>Director 2013-2014:</strong></td>
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<tr>
<td>Claire Ashby EA</td>
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<tr>
<td>Jan Bridges EA</td>
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<tr>
<td>Patty Pringle EA</td>
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<td><strong>Director 2013-2015:</strong></td>
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<tr>
<td>Mark Bole EA</td>
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<td>Sal Romo EA</td>
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<td>Marjorie Williams-Jones EA</td>
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<td>CSEA Director: Al Wise EA</td>
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<td><strong>Social Affairs:</strong> Carolyn Krieg EA</td>
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<td><strong>Website:</strong> Eric Rheinheimer EA</td>
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<td><strong>IRS Practitioner Panel:</strong> Phil Fiegler EA</td>
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<td><strong>CTEC Panel:</strong> Walt Thomas EA</td>
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<td><strong>Education Committee (1st VP):</strong></td>
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<td><strong>Chair:</strong> Al Wise EA</td>
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<td><strong>Annual Meeting:</strong> Patty Pringle EA</td>
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<td><strong>Continuing Ed:</strong> Mark Bole EA</td>
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<td><strong>Mini Seminar Team:</strong> Mark Bole EA</td>
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<td><strong>Program:</strong> Peggy Hall EA</td>
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<td><strong>SEE Class:</strong> vacant</td>
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<td><strong>Tax Talk:</strong> Patty Pringle EA</td>
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<td><strong>Town Hall:</strong> Peggy Hall EA</td>
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<td><strong>VITA Team:</strong> vacant</td>
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<td><strong>Administration Committee (IPP):</strong></td>
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<td><strong>Chair:</strong> Andy Rogers EA</td>
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<tr>
<td><strong>Bylaws/SOP:</strong> Sal Romo EA</td>
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<tr>
<td><strong>Bylaws/SOP:</strong> Clare Ashby EA</td>
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<tr>
<td><strong>Budget &amp; Finance:</strong> Walt Thomas EA</td>
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<td><strong>Chapter Office:</strong> Dagmar Bedard EA</td>
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<td><strong>Financial Review:</strong> Luciann Leraul CPA</td>
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<td><strong>Nominating:</strong> Andy Rogers EA</td>
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<tr>
<td><strong>Volunteer Coordinator:</strong> vacant</td>
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</tbody>
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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
2013 TAX TALK
Holiday Inn - 6680 Regional Street, Dublin, CA 94568

Nov. 6, 7, & 8 - 8:00 AM – 5:00 PM
Presented By
EAST BAY ASSOCIATION OF ENROLLED AGENTS

Register online at: www.123signup.com/event?id=dfphk
(Copy and paste into your browser)

***If paying by check please complete Seminar Registration Form on last page of this flyer***

November 6th
Lisa Ihm, EA – “Baby oh Baby”. This class focuses on issues that many people are getting wrong on tax returns and deductions that are being overlooked. Concepts such as dependency exemptions in nontraditional households and maximizing education credits by electing to tax scholarships. (4 Hours).

Vicki Mulak, EA, CFP – 2013 Tax Law Update for the California Practitioner
“A Blend” of federal and CA Updates. Includes an update on the “Affordable Care Act”. What are the penalties? Also learn about the “Medicare Surtax”. (4 Hours).

“Tax Talk after Hours” 5:30 PM to 7:00 PM
Enjoy Wine, Cheese and Crackers during a Q & A Session
Featuring
Joe Calderaro, EA, CSEA Tax Resource Specialist

November 7th
Vicki Mulak, EA, CFP – “Schedule C Business Deductions”. This class includes new updates on 1099 reporting and the new “Simplified Option” for the “Home Office Deduction”. Simplified vs Regular Method. What are the rules and what is best for our clients. (4 Hours)

Robert McKenzie, Esq., EA – “Don’t have a Seizure” protecting your client from the IRS Collection Division. (2 Hours). “How to be more Appealing to the IRS” This class will discuss the best way to file a winning appeal. (2 Hours).

November 8th
Lisa Ihm, EA – “COD” The deferred principal reduction under the “Home Affordable Modification Program” HAMP has complicated tax treatment. Settlements received under the CA Attorney General’s “Independent Foreclosure Review” raises many questions. Learn how to deal with these complex issues. (4 Hours).

Jennifer MacMillan, EA - Ethics (2 Hours Required)
Ms. MacMillan is Past Chair of the CSEA Ethics Committee

Preparing Same Sex Tax Returns in a Post-DOMA World. RDP couples will likely remain "unmarried" so a working understanding of Form 8958 is necessary. (2 Hours).
**Registration includes Continental Breakfast, Hot Lunch(Selection) , Snacks,**

All Materials

and

***After Hour Session on Wednesday (with paid Wednesday registration))***


******EARLY BIRD*******

NAEA/CSEA Members (3 Days 24 Hours CE) **$475.00** if registered on or before 9/30/13
Non Members (3 Days 24 Hours CE) $525.00 if registered on or before 9/30/2013
Any 1 Day (8 Hours CE) NAEA/CSEA Member $199.00 before 9/30/13
Any 1 Day (8 Hours CE) Non Member $229.00 before 9/30/13

After 9/30/13 Before 10/16/13
NAEA/CSEA Members (3 Days 24 Hours CE) $525.00
Non-Members (3 Days 24 Hours CE) $550.00 (3 Days 24 Hours CE)
Any 1 Day (8 Hours CE) NAEA/CSEA Members $219.00
Any 1 Day (8 Hours) Non-Members $239.00

After 10/17/13
NAEA/CSEA Members (3 Days 24 Hours CE) $550.00
Non-Members (3 Days 24 Hours CE) $575.00
Any 1 Day (8 Hours CE) NAEA/CSEA Members $239.00
Any 1 Day (8 Hours) Non-Members $259.00

All Registrations Include: Continental Breakfast, Lunch (Selection) 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.”

Refund Policy: Requests for registration refunds must be postmarked by October 15, 2013. All refunds are subject to a service charge of $50.00 per person.

Additional Information Contact Seminar Chair:
Patty Pringle, EA at 925-320-7802 or e-mail: eapattypringle@sbcglobal.net

Stay overnight and combine business with pleasure! Bring your spouse and tour the Greater Bay Area via BART, shop at nearby Stoneridge Mall, visit Livermore Wine Country or the Sunol Trail.

Special Seminar Rates at the:
Holiday Inn
6680 Regional Street
Dublin, CA 94568

Phone: (925) 828-7750 (Any calls outside this information may be routed to a central reservation desk and may not recognize the room blocks)
Single or Double (2 beds): $85.00* per night Reservation must be made prior to 10/15/13
Reservations should be called in between 9:00 AM – 5:00 PM, Mon – Fri
* Be sure to identify the group as EBAEA!
Name: ____________________________________

Firm Name: ________________________________

Address: ___________________________________

City: ________________________ State: _____ Zip: ________________

Phone: ___________________________ Fax: ______________________

E-Mail: _____________________________________

Badge Name: ________________________________

☐ Check here if you need special accommodations to fully participate and describe: ____________________
________________________________________________________________________________________

Check all that apply:       EA         CTEC         Non-member

Enrollment License #:______________ PTIN: _____________ EA Chapter Affiliation: ________________

Early Bird Must be Postmarked on or before 9/30/13
** 3 Day Early Bird NAEA/CSEA Member $475.00  $ _________  
** 3 Day Early Bird Non Member $525.00         _________  
** Any 1 Day Early Bird NAEA/CSEA Member $199.00 _________  
** Any 1 Day Early Bird Non Member $229.00    _________

Postmarked After 9/30/13 Before 10/16/13
** 3 Day NAEA/CSEA Member $525.00             _________  
** 3 Day Non-Members $550.00                  _________  
**Any 1 Day NAEA/CSEA Members $219.00        _________  
**Any 1 Day Non-Members $239.00              _________

Postmarked After 10/17/13
** 3 Day NAEA/CSEA Members $550.00             _________  
** 3 Day Non-Members $575.00                  _________  
Any 1 Day (8 Hours CE) NAEA/CSEA Members $239.00 _________  
Any 1 Day (8 Hours) Non-Members $259.00       _________

Total Payment $ __________

********Please Indicate Lunch Choice for Each Day in Attendance;************

Wednesday, November 6              Thursday, November 7              Friday, November 8
__ Pork Loin Dijonaise           __ London Broil                      __ Salmon
__ Chicken Piccata                __ Chicken Dijonaise                 __ Chicken Pomodoro
__ Vegetable Lasagna              __ Garden Vegetable Risotto          __ Eggplant Parmesan
NEW! Health Care Reform Quickfinder Handbook
Employer mandates to provide insurance coverage, individual mandates to obtain coverage, credits and subsidies to help individuals purchase coverage, exchanges for acquiring coverage, new reporting requirements and taxes are a few of the many changes that will impact your clients. They are likely to have questions. We’ve got the answers.

NEW! Quickfinder Annual Tax Update
Covers significant tax developments that occurred during the calendar year, making it easy to stay abreast of changes affecting your clients.

IRA & Retirement Plan Quickfinder Handbook
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.

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 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
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.)

See special pricing listed on back!
## ORDER INSTRUCTIONS

Every Quickfinder purchase you make earns money for your association!

- This order form includes pricing, s&h, sales tax, and more.
- We will be placing one group order to benefit from the best group pricing. All orders must be received by December 6, 2013.
- Make checks payable to Quickfinder.
- Orders must be faxed to 925.736.3853 or mailed to: Quickfinder, c/o Diann Gross, 232 Chatham Terrace, Danville, CA 94506.

## Product Pricing

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**c/o Diann Gross**     
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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!