NEXT MEETING Wed, March 19, 2014  
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  
7:00 Program: “IRS Tax Panel”  
Cost: $35.00 with reservation by Friday March 14  
$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.

March Topic: “IRS Tax Panel”  
Speakers: Joe Calderaro, EA; Karen Brosi EA, CFP®; Sharon Krieder, EA, CPA  
by Peggy Hall, EA Program Chair  
This month we will have our annual panel discussion on IRS 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, March 18th, 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.

As in years past, the session will be transcribed and the questions and answers will be emailed to every-one 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.  

You cannot get a more knowledgeable and fun panel of speakers. We have our long-time friend Joe Calderaro, EA, CSEA’s own “weapon of tax destruction”. We also have the dynamic duo of Karen Brosi and Sharon Kreider, two of the best-known and highest-rated speakers on the educational circuit. If you have never seen these three in action, you owe it to yourself (and your clients) to attend this meeting. If you have seen them before, well, then you’ve already signed up, haven’t you?

**PRESIDENT’S MESSAGE**  
by P. Gail Nanbu, EA  
At our February 2014 dinner meeting, Duncan Sandiland, EA, visited us from Texas, and discussed the advantages that our Chapter and CSEA give us over what is available in his current neck of the woods, especially in education offerings such as CSEA’s Super Seminars, the CSEA/IRS Federal Representation Workshop, the State Tax Agencies Liaison Meeting, CSTAR, and our own Chapter’s Tax Talk, as well as many seminars hosted by surrounding Chapters. So is the difference between NAEA state affiliate membership fees in Texas, $50 (per the NAEA website) and in California, currently $170, to be raised to $185 on July 1, 2014. The CSEA dues increase plus the NAEA fee will be a total of $385 for California members. Per our CSEA Director, Al Wise, EA, at the January 12, 2014, CSEA Board of Directors meeting, the Board reviewed and discussed various motions. “The motion that the Board spent the most time debating was the motion to increase our dues to CSEA by $15. The motion passed.” CSEA explained to me that for this year, many of our members will not see the increase since many of us renew before
July 1st, and that for most of us, we will see the increase with our 2015 dues renewal.

I was asked by a member to give a balanced perspective and at least mention the negatives of a dues increase. I think we all understand the negatives; and I write this to inform our members and not to provide pros and cons of the latest dues increase. Dues increases are not always easy for us. I can only speak for myself in determining whether the rewards outweigh the cost; and for me, it does. Most EAs are in the middle of one of our most challenging times – the tax season. The networking and outreach to member EAs at the Chapter, State and National levels have given me access to help and support in dealing with various tax dilemmas. I’ve been able to contact EAs in New York, Pennsylvania, Georgia, Florida, Southern California, and, most significantly, the Bay Area for immediate and responsive answers and suggestions.

Above all, this ability to seek and access REAL tax help from other EAs is worth so much more to me than my dollar cost to be a CSEA/NAEA member.

WANT NEW CLIENTS?
by Peggy Hall, EA, PIA Co-Chair

Your Public Information and Awareness team is hard at work. This year we are joining with Golden Gate Chapter to put large posters at BART stations in the East Bay and San Francisco. The large posters (see the end of this Bulletin) carry the message:
Taxes Are Complicated. Don’t Risk It!
EAs Are Tax Pros
findanea.com

FindanEA.com is a new website developed by Golden Gate Chapter that will refer people to an EA according to zip code. It is a beautiful website, check it out. We are putting the contact information for all of our active members into that website. IF YOU DO NOT WISH TO BE INCLUDED PLEASE OPT OUT by emailing ebaea@ebaea.com ASAP, preferably before the end of December.

Golden Gate Chapter will be covering BART stations in San Francisco.

We tried to represent all of the areas in the East Bay where we have members. Here are the 6 BART stations in which we chose to place the posters.

**North Berkeley**
**Rockridge**
**12th Street/Oakland City Center**
**Fruitvale**
**Walnut Creek**
**Fremont**

Please see the last page of this Bulletin for two photos of the installed signs.

TAX HELP DAY
by Andy Rogers, EA

**Tax Help Day is Friday March 7th, 9 am - 4 pm**

Tired of explaining what an Enrolled Agent is? Take a break from your tax practice for a few hours and join EBAEA and CSEA to help promote Enrolled Agents in California!

As a public service, we will answer questions in two locations this year, and other chapters of CSEA will be at locations throughout California this day.

We will not prepare any returns, provide any written advice, or bill anyone for our work. But we will answer taxpayer questions while informing people of the Enrolled Agent designation.

We have three locations this year:

**Lafayette Chamber of Commerce.** 100 Lafayette Circle in Lafayette, and

**Women’s Initiative for Self Employment** 1814 Franklin St, Suite 200 Training Room, Oakland.

**EBAEA Chapter Office, 30100 Mission Blvd, Hayward**

Please email Andy@TaxBuddha.com or phone (510) 332-0401 to sign up on our list of volunteers. We currently need help at all locations for both shifts. Shifts are 9 am - 1 pm, and noon - 4 pm.

We’ve got brochures, EA pens, and some kind of plastic wipey thingy case, all from CSEA for each location. Plus doughnuts!

Bring your favorite reference tool, like QuickFinder, Tax Book, or just your big brain and your experience!

FRUITS OF LEGISLATIVE DAY 2014
by Peggy Hall, EA, PIA Co-Chair

I spent a few hours with Gail Nanbu, EA and Aida Torres, EA making legislative visits. We picked up some slack and visited legislators outside of our district. We visited the offices of Senator Mark DeSaulnier (7th dist), and Assemblymembers Joan Buchanan (16th dist), Steve Fox (36th dist), Nancy Skinner (15th dist), and Marie Waldron (75th dist).

I want to report the results of the legislative visits of CSEA members that day.

1) Assemblymember Brown will be sponsoring a bill that will be introduced in February to fix the timing of Statements of Information from the Secretary of State to coincide with tax filing dates.

2) Senator Mimi Walters will be a sponsor of a bill to fix the PIT problems of SB 1244. SB 1244 brought conformity with federal for treatment of LLC members for purposes of payroll taxes, but left out conformity for PIT purposes.
3) Assemblymember Diane Harkey’s office submitted a “spot bill” to suggest an administrative change to fix the dissolution/reviver issue of entities that never officially launched but are accruing taxes.

   Make sure you tell your clients that you are part of an organization that is pummeling on the desks of legislators to advocate for “you” (meaning that very client that you are talking to).

EBEA Annual Meeting Notice
by Andy Rogers, Immediate Past President

The Annual Meeting of the East Bay Association of Enrolled Agents (EBAEA) will be held at the May EBAEA Monthly Dinner Meeting on May 21, 2014 at 6:45 pm at the Dublin Holiday Inn. The business of the Annual Meeting will include consideration of the following motion:

The Board of Directors of the EBAEA proposes that EBAEA suspend the rule at Article 5.02 to allow Carrie Kroeger to serve a third consecutive term as Secretary of the Association for the 2014-2015 Association year.

Background – EBAEA Bylaws Article 5.02 limits officers of the Association to serve no more than two consecutive terms in one office.

Additionally, the EBAEA Nominating Committee has proposed the following slate of candidates for our 2014-2015 fiscal year:

   President: Patty Pringle, EA
   1st VP: Al Wise, EA
   2nd VP: Aida Torres, EA
   Treasurer: Tim Hintzoglou, EA
   Secretary: Carrie Kroeger, EA
   Immediate Past President: Gail Nanbu, EA

   Director 2014-2016:
   Peggy Hall, EA
   Katherine Judd, EA
   open

   Continuing as Directors through 2015:
   Mark Bole, EA
   Sal Romo, EA
   Marjorie Williams-Jones, EA

   Continuing as CSEA Director through 2015:
   Al Wise, EA

   The EBAEA Bylaws provide that eligible members can run from the floor with no advance notice. However, as a courtesy to those planning the meeting (which is already under a very tight timetable), it is requested that any floor candidate provide advance notice to the Nominating Committee through its Chair, Andy Rogers at (510) 332-0401.

DINNER MEETING CE INFORMATION

“IRS Tax Panel”, 3/19/14

   • IRS: WZA09-U-00809-14-I: 1 hour of Federal Tax Law Updates
   • CTEC: 1001 - CE - 0553: 1 hour of California Tax Law Topics
   • CSEA/NAEA: 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).

Small Group Tax Meetings

<table>
<thead>
<tr>
<th>Location</th>
<th>Time</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Antioch/Brentwood</strong></td>
<td>Fridays 8:00am</td>
<td>Brentwood Cafe, 8500 Brentwood Blvd, Brentwood</td>
</tr>
<tr>
<td>Ken Seemann EA</td>
<td>(925) 634-8297</td>
<td></td>
</tr>
<tr>
<td><strong>Danville Area</strong></td>
<td>4th Tue 9:30am</td>
<td>Pascals French Oven, 155 Railroad Ave, Danville</td>
</tr>
<tr>
<td>Michael Power EA</td>
<td>(510) 366-8836</td>
<td></td>
</tr>
<tr>
<td><strong>Oakland Area (Near BART)</strong></td>
<td>4th Tue 9:00am</td>
<td>Buttercup Cafe, 229 Broadway, Oakland</td>
</tr>
<tr>
<td>Andy Rogers EA</td>
<td>(510) 332-0401</td>
<td></td>
</tr>
<tr>
<td><strong>Livermore Area</strong></td>
<td>Fridays 8:45am</td>
<td>Shari’s Restaurant, 1116 East Stanley Blvd, Livermore</td>
</tr>
<tr>
<td>Jerrilynn Krebs EA</td>
<td>(925) 606-8181</td>
<td></td>
</tr>
<tr>
<td><strong>Castro Valley</strong></td>
<td>3rd Tue 8:00am</td>
<td>Carrow’s, 2723 Castro Valley Blvd @ Lake Chabot, CV</td>
</tr>
<tr>
<td>Dagmar Bedard EA</td>
<td>(510) 537-3838</td>
<td></td>
</tr>
<tr>
<td><strong>South Alameda County</strong></td>
<td>1st Wed 9:30am</td>
<td>Mimi’s, 24542 Hesperian, Southland Mall, Hayward</td>
</tr>
<tr>
<td>Sal Romo EA or Walt Thomas EA</td>
<td>(510) 487-1691</td>
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Email-only Group

Send an email to halloftaxes@gmail.com

Peggy Hall EA (925) 388-1040

UNIQUE OPPORTUNITY

After 8+ years and over 100 issues, I am retiring as Bulletin editor. No tax skills needed. If you can write proper sentences and read a calendar, you have all the skills you need to fill my shoes. I have templates, instructions, archives and lots of unused humor to help you. I will help you with the transition issues. Also, this position is compensated – you get a free dinner subscription. If you have questions, please email Duncan at bulletin@ebaea.org.
2014 CSEA digitAX SCHEDULE
Looking for a bite-sized chunk of high-quality info on a subject? CSEA’s 2014 schedule will be rolling out after tax season, but all the previous sessions are still available at www.csea.org. CE is not available after the live date, but all the yummy info is still there for you…

NAEA 2014-2015 ELECTIONS
by P. Gail Nanbu, EA
The 2014-2015 NAEA Election results included Jean Nelsen, EA, Golden Gate Chapter, as one of the new NAEA Directors to be sworn in in May 2014. Thank you to all who voted in this election. As members of EBAEA, CSEA, and ultimately NAEA, it is our duty to vote for those members who we feel will be strong representatives of our profession and Association. Our own Lonnie Gary, EA, is the current President-Elect of NAEA. He is not only serves NAEA, he serves the members of EBAEA in his dedication to all EAs.

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

Apr 30: Oakland - Basic Payroll, 1515 Clay St, 2nd floor, Room 9, Mark Bole, 9am-3pm, makbo@paebell.net

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.

WHAT IS YOUR COMPETITION DOING?
ERO data from the IRS, current through June 2013, lets you see how many returns have been e-filed for the last three years by tax offices in your vicinity, by firm name, address, and email. This can be used for business planning purposes, or to check whether your employees are filing returns on the side. Commercial services charge hundreds of dollars to provide this data to you in spreadsheet format.

I have gone to the trouble to obtain the same data and process it, and am offering data extracts to fellow EBAEA members on the following terms: either pick up the tab for a nice breakfast or lunch with me within five miles of Walnut Creek, where we can review the data and as a side benefit, increase our one-to-one professional networking, or pay a nominal fee of $20 to cover my overhead for the data extract. Contact Mark Bole, EA, at mark@MarkBoleTax.com for further details.

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.

TAX PROFESSIONALS WANTED
Senior Tax Preparer (EA or CPA) and Tax Preparer (EA or CRTP) for Secure Taxes, Incorporated, located in Hayward. Must be capable of completing accurate, timely client tax returns using Lacerte. Must be reliable, responsible and detail oriented. Must be computer literate and have experience with Lacerte, WORD, and Excel, including formula knowledge. Five to ten years of verifiable experience as an EA, CPA or CRTP required. Salary is dependent upon experience. Interested parties please forward a detailed cover letter outlining experience and a resume with at least three professional references to personnel@yoursecuretaxes.com. For complete job descriptions go to www.yoursecuretaxes.com.
PART-TIME HELP WANTED
Part-time tax preparer needed for small Oakland tax office. Must have 2+ years of paid experience. Prefer experience with Lacerte. 1040 returns only. Very little client contact. Must be non-smoker and have own transportation. E-mail qualifications to JanZtax@aol.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

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.

CALENDAR OF EVENTS

March 2014
19 EBAEA Dinner Meeting: “IRS Panel”
   @ Holiday Inn, Dublin

April 2014
   No Dinner Meeting – enjoy your down time!
18 SuperSeminar final discount deadline (save $90)

HUMOR

Moe and Joe are sitting in a boat fishing, drinking beer and chewing tobacco when out of the blue Moe says, “I think I’m gonna divorce my wife. She ain’t spoke to me in over a month.” Joe sips his beer and says, “Better think it over, women like that are hard to find.”

Two friends went into a company to apply for a job. They filled out applications and then were asked to take a test. Because they were applying for the same job, the test was identical. After the test was scored the Human Relations recruiter said they had gotten the same exact score on the test. However, one friend was singled out and given the job over the other. The friend that did not get hired asked, “If we both got the same score on the test, why was my friend hired and not me?” “Because he had a better answer on one question,” the recruiter answered. “On question 26 he wrote as his answer ‘I don’t know.’ For the same question you wrote, me neither.”

While getting a checkup, a man tells his doctor that he thinks his wife is losing her hearing. The doctor says, “You should do a simple test. Stand about 15 feet behind your wife and say ‘Honey?’ Move 3 feet closer and do it again. Keep moving 3 feet closer until she finally responds. Remember how close you were when she gives you an answer. That will help me know how bad her hearing loss is.” About a month later the same guy is at the doctor, again complaining of his wife’s hearing problem. The doctor asks, “Well, did you do that experiment with your wife’s hearing?” The man says “Yes”. “How close did you get before she answered?” “Well, by the time I got about 2 feet away she turned around and screamed “For the FIFTH TIME... WHAT???”

A bent-over old lady hobbled into a doctor’s office. Within minutes, she came out again but miraculously, she was standing up as straight as could be. A man in the waiting room who had been watching her said in amazement, “My goodness, what did the doctor do to you?” The old lady replied, “He gave me a longer cane!”

A duck walks into a bar and asks, “Got any grapes?” The bartender, confused, tells the duck no. The duck thanks him and leaves. The next day, the duck returns and asks, “Got any grapes?” Again, the bartender tells him, “No, the bar does not serve grapes, has never served grapes and, furthermore, will never serve grapes.” The duck thanks him and leaves. The next day, the duck returns, but before he can say anything, the bartender yells, “Listen, duck! This is a bar! We do not serve grapes! If you ask for grapes again, I will nail your stupid duck beak to the bar!” The duck is silent for a moment, and then asks, “Got any nails?” Confused, the bartender says no. “Good!” says the duck. “Got any grapes?”

There was a nun who worked as a nurse at a local hospital. She was driving the hospital van when it ran out of gas about a mile from a gas station, so she decided to walk to the gas station to get some gas, but the station didn’t have a gas can for her to transport the gas back to the van. She walked back to the van, trying to figure out what to do when she realized that she had some bed pans in the van that she could use. So, she got a bed pan and walked back to the gas station, filled it up and walked back to the van. As she was pouring the gas into the tank, two men in a truck drove by. One said to the other, “Man, if that works, I’m turning Catholic!”

With high-definition TV everything looks bigger and wider - kind of like going to your 25th high school reunion.

Relationships are a lot like algebra. Have you ever looked at your X and wondered Y?
### 2013 - 2014 Board of Directors and Committee Chairs

President: P Gail Nanbu EA 925-943-3993
1st VP: Al Wise EA 707-634-4TAX
2nd VP: Aida Torres EA 510-724-6409
Treasurer: Tim Hintzoglou EA 925-930-7737
Secretary: Carrie Kroeger EA 925-686-1600
Immed Past Pres: Andy Rogers EA 510-332-0401
Director 2013-2014:
- Claire Ashby EA 925-462-0538
- Jan Bridges EA 510-505-0818
- Patty Pringle EA 925-912-1682
Director 2013-2015:
- Mark Bole EA 925-287-0366
- Sal Romo EA 510-471-9492
- Marjorie Williams-Jones EA 510-482-6204
CSEA Director: Al Wise EA 707-634-4TAX

### Communication Committee (2nd VP)

Chair: Aida Torres EA 510-724-6409
Bulletin: Duncan Sandiland EA, etc 800-617-1040
Disaster Services: Janet Bridges EA 510-505-0818
Legislative: Eva Konigsberg EA 510-928-5067
Membership: Aida Torres EA 510-724-6409
Practice Preservation: Linda Fox EA 925-846-5913
PIA: Patty Pringle EA 510-912-1682
PIA: Peggy Hall EA 925-388-1040
Quickfinders: Diann Gross EA 925-736-3853
Social Affairs: Luciann Leraul CPA 925-518-9076

### Education Committee (1st VP)

Chair: Al Wise EA 707-634-4TAX
Annual Meeting: Patty Pringle EA 510-912-1682
Continuing Ed: Mark Bole EA 925-287-0366
Mini Seminar Team: Mark Bole EA 925-287-0366
Program: Peggy Hall EA 925-388-1040
SEE Class: vacant
Tax Talk: Patty Pringle EA 510-912-1682
Town Hall: Patty Pringle EA 510-912-1682
Town Hall: Peggy Hall EA 925-388-1040
VITA Team: vacant

### Administration Committee (IPP)

Chair: Andy Rogers EA 510-332-0401
Bylaws/SOP: Sal Romo EA 510-471-9492
Bylaws/SOP: Clare Ashby EA 925-462-0538
Budget & Finance: Walt Thomas EA 510-725-8356
Chapter Office: Dagmar Bedard EA 510-537-3883
Financial Review: Luciann Leraul CPA 925-518-9076
Nominating: Andy Rogers EA 510-332-0401
Volunteer Coordinator: vacant

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**EAST BAY ASSOCIATION OF ENROLLED AGENTS**

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(800) 617-1040 or (510) 487-2063  fax (510) 487-1501  email: ebaea@ebaea.org