NEXT MEETING ON ZOOM:

Wed., Sept 16, 2020

2:00 – 4:00 pm

Program: “Ethics”

Register through the link in the email from EBAEA

Cost: $35.00

Webinar will qualify for 2 hours of Continuing Education.

September Session: Ethics
Speaker: Beanna Whitlock, EA

Beanna’s Ethics Class keeps it real. Examples of real situations that tax professionals can relate to.

Previous Tax Talk attendees have praised this as the best Ethics Class they have ever attended.

“This is what EBAEA Member Anne Griffith, EA has to say about Beanna.

“Several years ago, I had the opportunity to attend a seminar at "Best of The West" in Nevada. The class I signed up for was full, so I decided to do one with Beanna instead. It was my first class with her but by no means my last! She is very knowledgeable but more than that she is a very talented speaker, no way will you be bored. Every Ethics class I have taken is so run of the mill, so I am anxious to see what Breanna brings to this one!”

Speaker Bio: Beanna Whitlock, is an Enrolled Agent in private practice. Known for her fierce defense of the tax professional community, Beanna is frequently consulted by accounting and tax publications regarding issues concerning the tax professional community.

Beanna is the Executive Director of the ncpe Fellowship, a web based organization providing educational resources and practice management tools for tax professionals at www.ncpefellowship.com.

PRESIDENT’S MESSAGE
by Sharon Hinchman, EA

Here we are amidst another month of shutdowns and Zoom has become a verb as well as a noun. I’ve spent a lot of time Zooming to meetings lately.

We are all getting well acquainted with the changes in our daily routine. Rather than wondering how much time to allot to get to the meeting, I’m trying to sneak in one more cup of coffee before I have to Zoom in.

We had our first virtual board meeting last month. The board decided to hold its meetings on the second Wednesday of the month rather than before the dinner meeting (if we ever get back to dinner!).

We had planned to have our chapter retreat on 9/9 at a park in Dublin. Since the weather won’t cooperate, it looks like we will be Zooming it again. Anyone that would like to sit in is welcome, just let Patty Pringle know so she can email you the link.

If there is an advantage to this shelter in place, it is the increased variety of speakers available to us from all over the US. Since we can’t get Beanna Whitlock to fly to California, we will Zoom to her in Texas this month for our 2-hour CE for ethics this year. I don’t want to steal any more of Peggy’s thunder.

For those of you that haven’t heard, the never-ending tax season will keep dragging on until 12-15 for anyone in a fire zone. Guess we can the “thank God it’s over” party along with the Christmas party this year. I hope we can have a live party by December. I miss seeing everyone. Seeing you over Zoom is not the same.
CSEA NEWS
by Patty Pringle, EA, CSEA Director

CSEA Makes it Happen. Even a Pandemic could not hold CSEA back. Super Seminars that were originally scheduled to take place in Reno took a complete pivot and with the hard work and diligence of the CSEA Staff was able to switch to a successful and well attended online Super Seminar using Zoom. Way to go CSEA.

A new Leadership Academy is in the planning stages at CSEA. An exploratory committee has been formed and I will keep you posted as it progresses. Would be a good opportunity for those of you that want to move up the ranks at CSEA.

Speaking of opportunities did you know that CSEA has an Education Foundation that awards scholarships? Check out the last pages of this bulletin and get additional information. You can also visit CSEA’s website CSEA.org > Thrive > Scholarships. The form is available in a fillable format. There are currently 3 deadlines to apply: June 30, September 30 (still time for this deadline) and December 31. Maybe some of you with employees that want to become EA’s can apply for a SEE Class Scholarship. CTEC’s are welcome to apply also for the SEE Class Scholarship.

Please be sure to mark your calendar for October 26th. CSEA will present the California State Tax Agencies Liaison Meeting (STALM). The event will be virtual this year and will feature CDTFA, EDD, FTB and CA SOS. Additional information can be found at CSEA.org.

Small Group Meetings are on Hold due to COVID-19

EBAEA’s annual Tax Talk Seminar – October 28-30 hopefully at the Holiday Inn, Dublin or it may be virtual but plan to attend!
From COVID-19 to the recent wildfires, tax pros and their clients continue to deal with many challenges this year. Let current and potential clients know you’re ready to help with their tax needs.

Whether you’re planning on virtual meetings or in-person appointments, our Enrolled Agent Fact Sheet (available in both English and Spanish) explains why EAs are "America's Tax Experts."

- Downloadable “Fillable” PDF - free of charge to Members! Easily type in your contact information, then save your customized PDF, upload it to your website and social media pages, and attach it to client emails.
- Downloadable “Blank Box” PDF - free of charge to Members! Conveniently print copies on your office printer, affix your business card, and mail or hand out to clients.
- Pre-printed "Blank Box" - professionally printed with an open box for you to attach your business card or sticker; or you can print your contact information directly on the fact sheet using your laser printer.
- Customized Print - give us your business card artwork and you can have a customized fact sheet. We'll coordinate all the work with our on-demand printer.

You can access the CSEA Marketing Tools through the CSEA web site www.csea.org/CSEA/Membership/Member_Benefits/Marketing_Tools

BULLETIN ADVERTISING POLICY
by Gail Stan, EA, 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 one issue. If you wish to run a notice for a longer period, you must resubmit the notice for each issue.
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 desired text to: EBAEA.Editor@gmail.com.
5) Member EA 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 $50 per issue insertion. (Professional Associates and Students are considered non-Members for advertising purposes.)

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.
2020 - 2021 Board of Directors and Committee Chairs

To contact any of the Officers & Volunteers below other than the Bulletin Editor, email the Chapter Office ebaea@ebaea.org and the email will be forwarded to the appropriate person.

(We have removed members email addresses as they are being used by scammers to request inappropriate financial payments and other scam practices.)

**President:** Sharon Hinchman, EA  
**1st VP:** Greg Crofton, EA  
**2nd VP:** Patty Pringle, EA  
**Treasurer:** Mark Bole, EA  
**Secretary:** Carolyn Krieg, EA  
**Immediate Past President:** Gail Stan, EA

**Director 2020 – 2021 (1 year):**  
Peggy Hall, EA  
**Director 2020 – 2022 (2 year):**  
Katherine Judd, EA  
Lourdes Rabara, EA  
Rachel Weil, EA

**CSEA Director:** Patty Pringle, EA

**Communication Committee**  
**Chair:** Gail Stan, EA  
*Bulletin:* Gail Stan, EA, EBAEA.Editor@gmail.com  
*Disaster Services:* Jan Bridges, EA  
*IRS Practitioner Panel:* Phil Fiegler, EA  
*Legislative:* Linda Fox, EA  
*Membership:* Sharon Hinchman, EA  
*Membership Ambassador:* Vacant  
*PIA:* Vacant  
*Practice Preservation:* Linda Fox, EA  
*Quickfinders:* Clare Flores, EA  
*Website:* Patty Pringle, EA

**Education Committee**  
**Chair:** Patty Pringle, EA  
*Continuing Education:* Katherine Judd, EA  
*Education Coordinator:* Marjorie Williams-Jones, EA  
*Mini Seminar Team:* Patty Pringle, EA  
*Program:* Peggy Hall, EA  
*SEE Class:* Vacant  
*Tax Talk:* Patty Pringle, EA  
*Town Hall:* Patty Pringle, EA

**Administration Committee**  
**Chair:** Vacant  
*Bylaws/SOP:* Gail Stan, EA  
*Audio/Visual Technical Advisor:* Eric Vale, EA  
*Chapter Office Administrator:* Patty Pringle, EA  
*Chapter Office Liaison:* Dagmar Bedard, EA  
*Financial Review:* Gail Stan, EA  
*Nominating:* Gail Stan, EA  
*Volunteer Coordinator:* Sharon Hinchman, EA

**EAST BAY ASSOCIATION OF ENROLLED AGENTS**  
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Bulletin editor: EBAEA.Editor@gmail.com, (Gail Stan, EA)  
Web Page: http://www.ebaea.org

The East Bay Association of Enrolled Agents (EBAEA) meets monthly on the 3rd Wednesday of each month except for the month of April. Board of Director meetings are currently being held on the 2nd Wednesday of each month using Zoom. Face-to-Face dinner meetings are usually held at the Dublin Holiday Inn although occasionally, we will meet somewhere else with plenty of notice to our members of the change in location for a particular month.

**Dublin Holiday Inn**  
6680 Regional St.  
Dublin, CA 94566
SCHOLARSHIP APPLICATION FORM
For California Residents

The primary purpose of the CSEA Education Foundation Scholarship Program is to foster, improve and provide access to tax-related information and services available to the general public through education programs and scholarships aimed at increasing the knowledge of current Enrolled Agents and potential Enrolled Agent candidates. This application is for EAs who wish to broaden their knowledge in the field of taxation. Please note that CSEA Education Foundation scholarships are NOT awarded for courses necessary to maintain Continuing Professional Education Requirements. All decisions of the CSEA Education Foundation are final.

Applicant Instructions & Checklist (If all required information is not included with your application it will be rejected)

___ Please include three personal letters of recommendation with your application. These could be written by your supervisor, a colleague, an instructor or someone you volunteer with, in your community.

___ If you are applying for reimbursement for a prior class, one of the letters must be from one of the event’s instructors and you must include a copy of your CPE Certificate and a copy of the paid receipt. Reimbursement Scholarships are only awarded within 12 months of the final date of the class.

___ Include a copy of the Education Provider’s event brochure or a detailed description along with a copy of your paid receipt from the provider if you have already registered. If you have not already registered and receive a scholarship the check will be made payable to the education provider. You must provide a copy of the paid receipt for direct reimbursement.

___ Submit a completed application to the CSEA Education Foundation Scholarship Committee, 3200 Ramos Circle, Sacramento, CA 95827-2513. Scholarships are awarded up to three times annually, your application will be considered in a timely basis and you will be notified of receipt of your application within two months after the application deadline. The deadlines for receipt of scholarship applications are currently June 30, September 30, and December 30 of each calendar year. Notification will be emailed to the address shown on the application.

___ Your scores are judged solely on your responses to the questions in the Applicant’s Statement. Please make sure to answer all the questions and be careful to either type out the questions with the responses below or clearly mark which question you are responding to. It is important to use proper grammar, punctuation, correct spelling, follow directions and to keep your answers brief and to the point. The scoring threshold for an applicant to receive a scholarship is 75%. The maximum amount of any scholarship award will be $800 per applicant per year.

___ Please note that this is an anonymous selection process; any inclusion of identifying personal or geographic information beyond the contact information section may disqualify your application. If you are not awarded a scholarship, you will have a second opportunity to apply and mentoring is available.
SCHOLARSHIP APPLICATION FORM
For California Residents

Application Type:
☐ Non- EAs who are considering an Enrolled Agent Career
   (Not Currently or Previously Licensed as an Enrolled Agent)
☐ California Enrolled Agent
   EA License # __________________________ Year Enrollment Card Received ________

Applicant: (Please type or print clearly)
Name (First and Last) ______________________________________________________________
Address __________________________________________________________________________
City, State & Zip Code __________________________________________________________________
Phone ___________________________ Fax __________________________________________
Email Address ______________________________________________________________

Are you a California resident? Yes ____ No____

Educational Event Information:
(Courses to further knowledge in field of taxation, finance and accounting, not for fulfillment of CPE requirements.)
Name of Event ______________________________________________________________
Date ___________________________ Street Address __________________________
Course Title & Description _____________________________________________________________________
Provider Name ___________________________ Street Address ______________________
Amount of Tuition $_________ Amount of Books/Materials $_________ Total Requested Amount $_________

How did you hear about the CSEA Education Foundation and its scholarship program?
________________________________________________________________________________________

Have you applied for, or been awarded, a scholarship from any other source for the education covered in this application? Yes _____ No____
If yes, from what source? ____________________________________________________________ Amount Awarded $_________

I CERTIFY THAT ALL STATEMENTS CONTAINED IN THIS APPLICATION ARE TRUE TO THE BEST OF MY KNOWLEDGE AND BELIEF. I UNDERSTAND THAT FALSIFICATION OF THE INFORMATION CONTAINED HEREIN WILL VOID THIS APPLICATION AND DISQUALIFY ME FROM RECEIVING CSEA EDUCATION FOUNDATION SCHOLARSHIPS.

SHOULD YOU BE AWARDED A SCHOLARSHIP THROUGH CALIFORNIA SOCIETY OF ENROLLED AGENTS, I UNDERSTAND MY NAME WILL APPEAR IN A HARDCOPY AND IN ANY ELECTRONICALLY CSEA PUBLICATIONS.

SIGNATURE_________________________________________ Dates __________________________
SCHOLARSHIP APPLICATION FORM
For California Residents

Applicant’s Statement

Please make sure to follow directions and check your work carefully for typos. Pay close attention to grammar, spelling and punctuation.

Please attach a separate statement, no more than three to four pages in total length. Please follow this format/question order when responding.

1. What is your educational background and what are your specific educational goals? (100 words or less)

2. What is your current professional position and what are your career and professional goals? (100 words or less)

3. Please describe your major volunteer, or community accomplishments over the past ten years. (100 words or less)

4. A. Please answer if you are Not an Enrolled Agent: Provide a description of what an Enrolled Agent is and what you believe is an Enrolled Agent’s role, duties and responsibilities? Please answer in your own words. (200 words or less)

   B. Please answer if you are a California Enrolled Agent: Please answer the following question in your own words. “What is an Enrolled Agent and how does this help the taxpayer?” (200 words or less)

5. How would the award of a scholarship help you further your career as an EA, other than financial need? (100 words or less)

6. Explain the relationship of CSEA and NAEA to an Enrolled Agent. (100 words or less)

7. What additional information do you believe may be helpful to us in evaluating your application? (100 words or less)
The 26th Annual
Tax Practitioner/IRS Fall Seminar

SJSU/MST Program - East Bay Association - Mission Society
Big Valley Chapter - Channel Islands Society - Inland Empire Chapter

November 4th & 5th (5 Hrs. each day)

Virtual

EVENT TOPICS (Subject to Change)

Tax Panels: With IRS (Speakers TBD), FTB- Marc Narlesky
Joe Calderaro, EA, Alan Pinck, EA,
Franchise Tax Board Update
Ethics (2 Hrs) – Sharyn Fisk, Director OPR
Additional Presenters TBD

Please contact: Randy Warshawsky, EA Randy@4taxman.com or Patty Pringle, EA patty@eastbaytaxmatters.com