NEXT MEETING: Wed., Jan. 15, 2020

Place: Dublin Holiday Inn
6680 Regional St., Dublin, CA 94568
(go to http://www.holidayinn.com/hotels/us/en/dublin/dubrm/hoteldetail#Directions, or take BART!)

4:30 Board Meeting
6:30 Dinner Buffet
7:15 Program: “Tax Advocacy Strategies for the Enrolled Agent”

Cost: $45.00 with reservation by Monday, Jan 13
$55.00 with reservation after deadline or at the door

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.

January Session: Tax Advocacy Strategies for the Enrolled Agent
Presented by Maine Shafer, JD

Learn how to add thousands in appropriate new deductions to your client's income tax returns.
Here's some of what you'll learn:
• How you and certain of your clients can deduct 100% of insurance premiums and virtually all medical costs, even dental, as a business expense.
• Navigating the NEW 20% Section 199A DEDUCTION specifically for Self-Employed Professionals and worth up to $63,000.00.
• How to safely qualify your and your clients' home office for deduction even when most office time is spent at an outside business office --and how to properly avoid taxes on the sale of a home that includes a home office.
• Become a knowledgeable advocate for your business clients' new food and beverage deductions.
• Tips to effectively audit-proof deduction strategies.

Become the tax advisor of choice by giving your clients legal and ethical tax deductions that few tax preparers ever hear about!

About your Instructor:
Maine Shafer, JD, has more than 15 years’ experience as a professional speaker delivering tax reduction strategies on behalf of Bradford and Company, Inc. His strong background in taxes started when working for a U.S. senator on Capitol Hill while receiving his law degree from Georgetown University Law Center, and continued as an assistant attorney general for the State of New Mexico and attorney for the New Mexico Real Estate Commission. Maine’s platform abilities have involved not only making tax information clear and usable but also delivering sales and motivational speeches and programs throughout the western U.S.

TAX HELP DAY – FEBRUARY 1

• What: Tax Help Day – East Bay, a free public service sponsored by the California Society of Enrolled Agents (CSEA) and its 19 Chapters
• When: February 1, 9am to 1pm
• Where: Pleasanton Farmers Market, 77 W Angela St., Pleasanton
• Who: Need EAs to volunteer to man the booth – you can work the whole 4 hours or any portion of the time that works for you
• Contact: Patty Pringle, EA at the Chapter office 800-617-1040 or ebaea@ebaea.org
PRESIDENT'S MESSAGE
by Gail Stan, EA, MBA, MLS

For the third consecutive year, we had a Holiday Mixer in December rather than a regular dinner meeting. One of the rules for the mixer is “No Talking Taxes.” The purpose of the mixer is to get a chance to know more about your fellow EAs as people. To facilitate this, we have an ice breaker game where each person was given a sheet with 20 questions on it and they had to talk to other guests and find out if they had ever done any of the items on the list, and if so, they could sign their name to that item. And for the third time, there was one item that no one in the room had done. You can see the list of questions later in this Bulletin.

Now that it is January, we are all gearing up for tax season. Don’t forget to order your Quickfinder. The order form is at the back of the Bulletin and if you use this form, then the Chapter receives a percentage from Quickfinder.

Many of you know Vick Mulak as she has been one of the speakers and our annual Tax Talk Seminar for many years and also at Super Seminar. You may also have heard that Vicki has been very ill and is not expected to recover. Please keep Vicki and her family in your thoughts and prayers. To honor Vicki, donations may be made to the CSEA Legislative Action Fund. The LAF pays for the Lobbyist that monitors CA legislative activity. Our Lobbyist helped get EAs an exemption from AB5 (Dynamex)

EAs AVAILABLE TO SPEAK

There are a number of chapter members who welcome the opportunity to speak 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.

CSEA NEWS

For those of you who are Full Members of CSEA (which at the moment means that you also are a member of NAEA), CSEA will be sending out an electronic ballot to approve some changes to the CSEA By-laws. The changes remove references to NAEA in the CSEA Bylaws and, if approved, will change all the current CA EA Associates to Full Members. This change would make them eligible to vote at both the CSEA and Chapter level and to run for Chapter Officer positions and Board of Director positions.

There will be several emails from CSEA explaining the details of the changes and the voting process. The voting window will be open for 14 days – from January 23 through February 5. If you are currently a Full Member, please exercise your right to vote on these Bylaws changes.

The CSEA PIA Committee has created some new brochures that are now available in both English and Spanish. You can see them on the CSEA website, but you will only be able to download them or purchase them if you sign in to your CSEA account as they are located under “Member Resources.” If you don’t have a CSEA account, call Carrie Clark at the CSEA office (916) 366-6646 and she will help you get one set up.

A Dues increase is coming. At the CSEA Board meeting on January 5, 2020, a $20 increase in CSEA dues was approved and will become effective on 6/1/20. It has been 3 years since the last CSEA dues increase so this increase is about 3% per year for those 3 years. The new annual dues amount will be $215.

TAX PREPARER NEEDED

Adap Tax Financial, Inc., A financial planning & tax service firm, located in downtown Pleasanton, seeks a motivated seasonal tax preparer to assist with preparation and review of individual & business tax returns in a growing practice. Initially work is for Feb. – April 2019. Success with the upcoming tax season can lead to year-round work with future growth opportunity. EA or CPA preferred with at least 3 years of tax experience using CCH Axcess or ProSystem preferred. Must be detail oriented and customer focused. Competitive compensation based on skill and experience. Please send your cover letter and resume to: gcrofton@adaptax.com.
MULTIPLE STAFF POSITIONS NEEDED

1. Personable and experienced Enrolled Agent or CPA for permanent/seasonal part-time/full-time employment for the upcoming tax season and beyond.
2. Friendly and energetic support staff for permanent/seasonal and full-time/part-time employment during upcoming tax season and beyond.

Send resume and cover letter describing how you are qualified and what you can bring to the company to:

Efax 707-240-4717 or email to sylvia@taxangels.com

Join a small group meeting!

Small Group Tax Meetings

Antioch /Brentwood
Brentwood Café, 8500 Brentwood Blvd, Brentwood
Ken Seamann EA (925) 634-8297

Danville Area
2nd & 4th Thurs 8:45 am
Life is Sweet Bakery, 155 Railroad Ave, Danville,
Michael Power EA, CFP (510) 366-8836

Oakland Area (Near BART)
4th Tue 9:00 am
Buttercup Café, 229 Broadway, Oakland
Andy Rogers EA (510) 332-0401

Livermore Area
2nd & 4th Thurs 8:45 am
Brick Café, 833 E. Stanley Blvd., Livermore
Allison Johnson, EA 925-518-0882

Castro Valley
3rd Tue 8:30 am
Dino’s Restaurant, 20390 Lake Chabot Rd, Castro Vly
Dagmar Bedard EA (510) 537-3883

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

**January 2020**

4-5 CSEA Board and Committee Meetings
Sacramento, CA

15 EBAEA Dinner - Dublin Holiday Inn
Topic: Tax-Reduction Strategies
Speaker: Maine Shafer, JD, Bradford & Co.

20 Martin Luther King Holiday

**February 2020**

1 Tax Help Day – Pleasanton Farmer’s Market – 9 AM TO 1 PM

14 Valentine’s Day

19 EBAEA Dinner - Dublin Holiday Inn
Topic – CA Tax Panel
Panelists: Karen Brosi, EA and Susan Maples, FTB

**March 2020**

18 EBAEA Dinner - Dublin Holiday Inn
Topic – Federal Tax Panel
Panelists: Karen Brosi, EA, and Joe Calderaro, EA

**April 2020**

No Meeting – Everyone is too Busy!

**June 2020**

16-18 Super Seminar, Peppermill Resort, Reno
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.
2019 - 2020 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: Gail Stan, EA
1st VP: Patty Pringle, EA
2nd VP: Sharon Hinchman, EA
Treasurer: Lourdes Rabara, EA
Secretary: Katherine Judd, EA
Immediate Past President: Gail Stan, EA

Director 2019 – 2020 (1 year):
Carolyn Krieg, EA
Sassa Oznowicz, EA
Aida Torres, EA

Director 2019 – 2021 (2 year):
Greg Crofton, EA
Peggy Hall, EA

CSEA Director: Sharon Hinchman, 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

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: Joanne Anderson, EA
PIA: Vacant
Practice Preservation: Linda Fox, EA
Quickfinders: Clare Flores, EA
Website: Patty Pringle, EA

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

The East Bay Association of Enrolled Agents (EBAEA) meets monthly except for the month of April. 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 9456
1. Have you ever been to Iceland?
2. Have you ever been to see the pyramids in Egypt?
3. Have you ever been to St. Petersburg?
4. Have you ever been to Budapest?
5. Have you ever lived in another country?
6. Have you ever won more than $1000 playing Craps?
7. Have you ever raised chickens?
8. Have you ever been to Machu Picchu?
9. Have you ever been to see a rock concert?
10. Have you ever climbed the Washington Monument?
11. Have you ever been to Yellowstone National Park?
12. Have you ever been on a cruise on the Yangtze River?
13. Have you ever been to Antarctica?
14. Have you ever panned for gold?
15. Have you ever been to Key West?
16. Have you ever ridden an elephant?
17. Have you ever been to see the New England fall colors?
18. Have you ever taken a train across the U.S.?
19. Have you ever driven a tractor?
20. Can you drive a stick shift?
**Federal Tax Essentials Library**
You survived the first tax season of complying with the Tax Cuts and Jobs Act (TCJA). Quickfinder Handbooks were there to guide you through the new rules and reporting requirements. Now that tax season is behind you, it’s time to address potential tax saving opportunities you may have noted when preparing your clients’ 2018 returns. And it’s time to identify and implement more tax planning ideas that may fit your clients in 2019. Quickfinder has the tax planning resources you need to ensure your clients’ 2019 tax bills are as low as the TCJA allows. And to help you not only survive but thrive during NEXT tax season, the library includes four of our most popular — and most essential — federal tax preparation handbooks. Learn more at tax.tr.com/qfbundles.

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### QUICKFINDER HANDBOOKS AND QUICK REFERENCE GUIDES

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**QUICKFINDER ORDER TOTALS:**

*Savings of up to 20% applies to new orders placed by April 14, 2020. Savings promotion excludes PPC, RIA, Checkpoint, and/or Checkpoint Learning CPE and may not be combined with any other offers.

Visit tax.tr.com/CSEAEB
CALCULATE YOUR QUICKFINDER ORDER DISCOUNTS AND SHIPPING CHARGES

**STEP #**
- **1** Enter your total number of products ordered
- **2** Enter your total QF order dollar amount $=
- **3** Calculate your discount dollar amount based on the chart above +$
- **4** Calculate Shipping for Quickfinder — $6.50/Handbook - $4.00/Tax table +$
- **5** Calculate Quickfinder Order Total — Add amounts from steps 2, 3 and 4. $

CALCULATE YOUR COMBINED ORDER TOTALS AND SHIPPING CHARGES

**STEP #**
- **6** Sales tax (apply your rate) $=
- **7** Grand total $=

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Payable to:  Quickfinder  
36786 Treasury Center  
Chicago, IL 60694-6700  

Payment Information

Make Checks and Money Orders Payable to Quickfinder  
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Note: The charge on your credit card statement will appear as TTA-Research & CPE  
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Visa MasterCard Discover AMEX  

CC Payments — Note: Our policy is to charge your credit card at the time of order.  
Expiration Date: 
Cardholder’s Name (printed as it appears on card)  
Cardholder’s Signature

3 EASY WAYS TO ORDER

- Visit tax.tr.com/CSEAEB  
- Call +1 800 431 9025  
- Mail in the completed order form

PRODUCT UPDATE POLICY

**Automatic Renewals:** Select products identified with ** herein are eligible to automatically renew. By initialing the Auto-Renewal box for any eligible product ordered herein, you acknowledge and agree that you are purchasing an automatic renewal subscription to the selected product(s) and that you understand that the subscription to the selected product(s) will automatically renew at the conclusion of your initial term for subsequent terms of one (1) year each, unless and until either party gives the other party written notice of termination before the end of the then-current term. Once a renewal term has commenced, it is non-cancellable. Subscription renewals will be invoiced based on the price in effect at the time of renewal, and the license fees are subject to increase over the previous year’s term (plus shipping and handling, if applicable). If a renewal term has begun, requests to cancel will be effective at the end of the current subscription term. Your automatic renewal will include shipments of periodic updates, revised editions, and/or supplements. Notifications of your upcoming renewal term will be sent approximately ninety (90) days in advance of the renewal date.

*New orders may be canceled within 30 days after purchase. Orders automatically renew prior to the subscription expiration and are non-cancellable after the start date of the renewal term. To cancel, provide written notice of termination before the start date of the renewal term. Requests for subscription cancellations or product returns may be made by calling +1 800 431 9025.

Visit tax.tr.com/CSEAEB  

*Savings of up to 20% applies to new orders placed by April 14, 2020. Savings promotion excludes PPC, RIA, Checkpoint, and/or Checkpoint Learning CPE and may not be combined with any other offers.