March / April 2020

NEXT MEETING: Wed., Mar. 18, 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
7:00 Program: "Federal Tax Panel"

Cost: $45.00 with reservation by Monday, Mar 16
$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.

March Session: Federal Tax Panel
Speakers: Joe Calderaro, EA, Karen Brosi, EA, and Sharon Kreider, EA, CPA

This month, we have our annual panel discussion on Federal tax issues. Submit your most challenging questions!

Please email your questions to Mike Power, CFP, EA at mpower@powerinvesting.net by Friday morning the 13th of March. This will allow our speakers time to research your questions. Let us be respectful of their time and extend the speakers this courtesy! You will also likely get a better answer as they will have more time to do research (Free! How sweet is that!) Mike will email you back within 24 hours indicating he received your question. If you do not get a return email, call him at (510) 366-8836.

If you have last minute questions, as late as Wednesday the 18th at noon, Mike would still appreciate the question arriving by email. This will save hours of transcription for the resulting Q&A that are written up and emailed back out within 48 hours of the meeting. Questions are first come, first serve, so you do run a risk with late arriving questions of not getting them answered.

The session will be 2 hours and qualifies for 2 hours of Continuing Education.

Our panelists: Joseph Calderaro, EA, has over 40 years of experience providing technical and procedural assistance to personnel in the examination, collection and taxpayer service and quality review functions with the IRS. He now provides technical support to CSEA Members in answering tax related questions.

Karen Brosi, EA, is well known to EBAEA members from presentations to the Chapter and various seminars. She has been practicing in Palo Alto as an Enrolled Agent and CFP for over 20 years. She was a senior tax specialist and director of financial planning at a respected Palo Alto CPA firm, prior to forming her own practice.

Karen is a past President of the Golden Gate Chapter, and past officer of CSEA. She speaks often at CSEA Super Seminars, and for Western CPE, and writes for major tax publications.

Sharon Kreider, CPA, EA, has been providing tax update classes to more than 15,000 California CPAs, EAs and other tax professionals for more than 20 years. She is a highly regarded professional speaker and a trusted instructor.

Sharon is a popular presenter at the CSEA Super Seminars and at the AICPA Tax Planning Conference for High Income Individuals.

Sharon is a regular contributor to Western CPE's Tax Tips and e-Tax alerts and has been quoted as a tax authority in the Wall Street Journal, Money Magazine, Forbes, The New York Times and a variety of local radio, television and print outlets.
Sharon was named as one of the Top 50 IRS Tax Practitioners by NPA Magazine and was named as one of the Top 40 Tax Advisers to Know in Recession by CPA Magazine.

PRESIDENT'S MESSAGE
by Gail Stan, EA, MBA, MLS

Tax season is in full swing and I am already 2 weeks behind on getting returns out the door.

Our February meeting was our annual CA Tax Panel with Karen Brosi, EA and Marc Narlesky from FTB’s Taxpayers’ Rights Advocate’s Office. They did a fabulous job of answering our CA questions and even answered some Federal questions.

I am sure there will be lots of questions for our March Federal Tax Panel. Our impressive group of panelists are – Karen Brosi, EA, Sharon Kreider, EA, CPA and Joe Calderaro, EA. You want to get your questions in early; see the lead article in this Bulletin for details to submit your questions.

We do not have a meeting in April and there will be no April Bulletin. So our next chance to get together will be May 20 which is also our Annual Meeting and Election of Officers.

Hope to see you at one of these well attended meetings.

PROPOSED CHANGES TO EBAEA BYLAWS

At the February 19th Board of Directors’ meeting, the Board voted to submit the following Bylaws changes to the EBAEA membership at the Annual Meeting on May 20, 2020.

Article 10.01 of the Bylaws states, “The proposed amendment shall be published in the Association Bulletin and voted on at the second membership meeting after the publication date of the bulletin. A two-thirds (2/3) of members present and voting shall adopt. Alternatively, amendments may be presented, without prior circulation to the membership, at the annual May business meeting of this Association. In this event, it will require a two-thirds (2/3) vote of the membership present and voting to adopt.”

Proposed text changes are in red:

ARTICLE V – Officers

5.03 Election and Term of Office. At each annual meeting the members shall elect the officers based on nomination by the Nominating Committee as supplemented by nominations from the floor. Officers serve for a term of one year except for the Treasurer, who serves for a term of 2 years.

5.09 Removal. An officer or Director shall may be removed from the Board office for missing two consecutive unexcused meetings of the Board of Directors by a majority vote of the Board.

CHALLENGE

Many of you knew Vicki Mulak, EA, CFP as she has been one of the speakers and our annual Tax Talk Seminar for many years and also at Super Seminar. It is with great sadness that we share the news that Vicki lost her years long battle with cancer and died on January 10, 2020. To honor Vicki, donations may be made to the CSEA Legislative Action Fund.

The Legislative Action Fund (LAF) was formed in 1985 to battle against legislative actions which might inhibit the rights of Enrolled Agents to practice. Since then it has grown to include proactive efforts to promote legislation in support of the interests of EAs and their clients.

Vicki’s unwavering passion in the legislative arena to protect EAs right to practice and her diligence in fighting for efficient and effective state tax administration benefited every taxpayer in California.

The EBAEA Board voted at our January 15, 2020 meeting to match member contributions to LAF of up to $1,000. If you contribute to LAF, you will need to let the Board know – you can send an email to ebaea@ebaea.org with the amount of your contribution. Your donation needs to be made by the March Dinner meeting, March 18, 2020, to be considered for this Chapter match.
5 Reasons Why You Should Volunteer

1. Volunteers live longer and are healthier.
2. Volunteering establishes strong relationships.
3. Volunteering is good for your career.
4. Volunteering is good for society.
5. Volunteering gives you a sense of purpose.

WE NEED VOLUNTEERS!

The Nominating Committee’s is looking for volunteers to fill our Officer positions. The East Bay Association of Enrolled Agents is an Incorporated Chapter and as such, is required to have Officers. We are an all-volunteer organization and officers commit to spending the time necessary to run the organization.

Of the current Board Members, 2 Directors will continue for the 2020-2021 term – Greg Crofton and Peggy Hall. All of the other Officers & Directors will be termed out and cannot continue in their current positions.

The following positions are open:
- President
- 1st Vice President
- 2nd Vice President
- Secretary
- Treasurer
- CSEA Director (is usually the 1st Vice President but can be a separate position)
- 4 Directors

The proposed changes to the CSEA Bylaws were approved, which means all the current CA EA Associates are being converted to CSEA Full Members. So you are now eligible to vote at both the CSEA and Chapter level and to run for Chapter Officer positions and Board of Director positions.

If you have an interest in being an Officer or Director, please contact Sharon Hinchman, Nominating Committee Chair or Gail Stan. Our May dinner meeting is our Annual Meeting and Election of Officers, so please give serious consideration to volunteering for a position.

CSEA NEWS

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.

Small Group Tax Meetings

<table>
<thead>
<tr>
<th>Area</th>
<th>Day</th>
<th>Time</th>
<th>Location</th>
<th>Contact</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antioch/Brentwood</td>
<td>Fridays</td>
<td>8:00 am</td>
<td>Brentwood Café, 8500 Brentwood Blvd, Brentwood</td>
<td>Ken Seamann, EA</td>
<td>(925) 634-8297</td>
</tr>
<tr>
<td>Danville Area</td>
<td>2nd</td>
<td>Tue 8:30 am</td>
<td>Life is Sweet Bakery, 155 Railroad Ave, Danville,</td>
<td>Michael Power EA, CFP</td>
<td>(510) 366-8836</td>
</tr>
<tr>
<td>Oakland Area</td>
<td>4th</td>
<td>Tue 9:00 am</td>
<td>Buttercup Café, 229 Broadway, Oakland</td>
<td>Andy Rogers, EA</td>
<td>(510) 332-0401</td>
</tr>
<tr>
<td>Livermore Area</td>
<td>4th</td>
<td>Thurs 8:45 am</td>
<td>Brick Café, 833 E. Stanley Blvd., Livermore</td>
<td>Allison Johnson, EA</td>
<td>(925) 495-4189</td>
</tr>
<tr>
<td>Castro Valley</td>
<td>3rd</td>
<td>Tue 8:30 am</td>
<td>Norman's Grill, 3638 Castro Valley Blvd, Castro Valley</td>
<td>Dagmar Bedard, EA</td>
<td>(510) 537-3883</td>
</tr>
<tr>
<td>Email-only Group</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>as needed</td>
</tr>
<tr>
<td>Peggy Hall, EA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(925) 388-1040</td>
</tr>
</tbody>
</table>
March 2020

17  St. Patrick’s Day
18  EBAEA Dinner - Dublin Holiday Inn
    Topic – Federal Tax Panel
    Panelists: Karen Brosi, EA, Joe Calderaro, EA
    and Sharon Kreider, EA, CPA

April 2020

  No Meeting – Everyone is too Busy!

May 2020

20  EBAEA Dinner - Dublin Holiday Inn
    Topic – When Does Rental Property Generate
    Qualified Business Income
    Speaker: David Fogel, CPA
    Annual Meeting and Election of Officers

June 2020

16-18  Super Seminar, Peppermill Resort, Reno
17  EBAEA Dinner - Dublin Holiday Inn
    Installation of Officers

July 2020

20  EBAEA Dinner - Dublin Holiday Inn

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 Oznovicz, 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, EA  
*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

---

**EAST BAY ASSOCIATION OF ENROLLED AGENTS**
6400 Village Parkway, Suite 201, Dublin CA 94568-3006  
(800) 617-1040 or (925) 320-7802  
fax (925) 553-3515  
e-mail: ebaea@ebaea.org  
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 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 94568