**Next Meeting On Zoom:**

**Wed., Nov. 18, 2020**

2:00 – 4:00 pm

Program: “The Ever-Changing Landscape of AB5”

Register through the link in the email from EBAEA

Cost: $25.00

Webinar will qualify for 2 hours of Federal CE.

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**November Session: The Ever-Changing Landscape of AB5 and how it Relates to both Federal and CA**

Speaker: Juan Montes, EA

Virtual Webinar featuring Juan Montes, EA. Juan will present the "The Ever-Changing Landscape of AB5" and how it relates to both Federal and CA. The cost to attend the 2 Hour Virtual Webinar is $25.00

**Speaker Bio:** Juan Montes earned a B.S. in accounting, a law degree, and he is a licensed Enrolled Agent, an NTPI Fellow, and has 15 years’ experience as a tax professional. Juan has been quoted numerous times in the San Francisco Chronicle and U.S. News & World Report. He has successfully defended audits before the Internal Revenue Service (IRS), California Franchise Tax Board (FTB), California Department of Tax and Fee Administration (CDTFA), and Employment Development Department (EDD) and has settled millions of dollars in tax debt with federal and state tax agencies. During law school Juan won awards for earning the highest overall grade in the courses of Civil Procedure Law, Personal Property Law, and California Community Property Law. As an Enrolled Agent who specializes in audit defense and representation, this knowledge is invaluable in obtaining great results for his clients.

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**President’s Message**

*by Sharon Hinchman, EA*

Happy close of tax season----I think. I’m noticing more time going off to planning for next year and our Brave New World. It appears we will all have to learn to work more on line and have met this new thing called Zoom.

Speaking of Zoom, we are looking forward to our belated fall seminar after Thanksgiving. I won’t steal Patty’s and Peggy’s thunder. Look for more in this newsletter or in Patty’s E-blast.

Jay Lang of Sacramento Chapter started a Presidents meeting to discuss the problems and concerns of other chapters. What we have discovered is we all have many of the same problems and concerns. What I find interesting is many of the chapters are going dark until May, in hopes there is some of the old normal back. East Bay, on the other hand is going forward with a full, online program. That says a lot for our staff and for you as an audience.

We have actually had better attendance at most webinars than at a live meeting. Now that our attendance is up, how about participation? There are a lot of behind the scenes jobs that can be done remotely to help us out. It's also a good time to get reacquainted with your
fellow members. Oh, I do miss a glass of wine with friends.

**IRS Stakeholder Liaison**
by Patty Pringle, EA

The IRS Stakeholder Liaison for the East Bay is Erin Young erin.young@irs.gov

The Stakeholder Liaison establishes relationships with practitioner and industry organizations representing small business and self-employed taxpayers. We provide information about the policies, practices, and procedures the IRS uses to ensure compliance with the tax laws. They also elevate issues that affect tax administration.

You may also want to find out more about the Issue Management Resolution System (IMRS). The IMRS conference call is held monthly. IRS Stakeholder Liaisons and IMRS Program Analysts are interested in hearing from you! Are you experiencing problems with the tax filing season, Identity Theft issues, etc.? We want to help resolve systemic issues having to do with federal tax related policies, practices and/or procedures.

Meetings are usually held on the 4th Wednesday of the month, however due to the Thanksgiving Holiday the next meeting will be on Wednesday, December 2, 2020 at 11:30 PST. If this is your first time calling in, please call in at 11:25 to find out more about IMRS.

RSVP: email Jennifer.Henrie-Brown@irs.gov to receive call in instructions.

**TAX PREPARE**

TAX PREPARER: Adap Tax Financial, Inc., A planning focused, financial planning & tax service firm, located in downtown Pleasanton, seeks a tax preparer for the 2020 tax season to assist with preparation and review of individual tax returns. Extension to year-round work is possible as we have year-round work. Work will be a mix of in-office and remote. We are 100% cloud based to allow remote access and client collaboration including: tax software, document management, client portal, CRM & e-signatures. Our tools and process appeal to younger, tech savvy clients. Must be detail oriented and customer focused. Competitive compensation based on skill and experience. Training & support available. Please send your cover letter and resume including details of your tax software experience to gcrofton@adaptax.com.

We are an East Bay firm looking for an experienced tax professional to prepare individual and fiduciary income tax returns and is interested in further developing their expertise in income tax work as well as trust and estate planning. Competitive benefits and 401k/Profit Sharing. Open door policy with partners and managers for collaboration and support. FT/PT. Contact Alexa at 925-944-1881; afeenen@igrcpa.com

**EBAEA’s annual Tax Talk Seminar** will be virtual this year – late November-early December. Watch your email for an eblast from EBAEA when dates and speakers/topics are confirmed.

**Small Group Meetings are on Hold due to COVID-19**
**November 2020**

18 EBAEA Webinar – “The Ever-changing Landscape of AB5”  
**Speaker** – Juan Montes, EA

26 Thanksgiving

**December 2020**

9 EBAEA Board Meeting 12:00 pm via Zoom

18 EBAEA Webinar

25 Christmas

**January 2021**

13 EBAEA Board Meeting 4:30 pm via Zoom

20 EBAEA Webinar

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**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

**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:** Vacant  
**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:** Gail Stan, EA  
**Volunteer Coordinator:** Sharon Hinchman, EA

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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  
email: 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 on the 3rd Wednesday of each month except for the month of April. Webinars have taken the place of Face-to-Face dinner meetings until further notice.

Board of Directors meetings are currently being held on the 2nd Wednesday of each month using Zoom. If you would like to attend a Zoom Board Meeting, please contact Patty Pringle at the EBAEA office so that she can include you and send you the link for the Zoom meeting.