



The Bulletin

East Bay Association of Enrolled Agents

*A Chapter of the California Society of Enrolled Agents
Affiliated with the National Association of Enrolled Agents*

March 2015

NEXT MEETING **Wed, March 18, 2015**

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

6:15 Networking

6:45 Dinner Buffet

7:30 Program: **"IRS Tax Panel"**

Cost: \$40.00 with reservation by Friday, Mar. 13
\$50.00 with reservation after deadline

Course numbers and credit:

IRS: WZA09-U-01276-15-I

CTEC: 1001-CE-7754

CSEA/NAEA: 1 Hour of Federal Tax Law Updates

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 ebaean@ebaean.org (preferred) or call 800-617-1040.

March Session: "IRS Tax Panel"

Speakers:

Karen Brosi, EA, Joe Calderaro, EA

by Robert L. Seymour, EA

This month, we have our annual panel discussion on Federal tax issues. Our speakers are among the most knowledgeable and enjoyable you'll hear, with extensive experience and insight into Federal tax law.

Submit your most challenging questions! The panelists will answer and discuss questions submitted by attendees. If time allows, questions submitted at the dinner will be addressed, but questions will be taken in the order received, with questions that were submitted in advance by email being considered first.

E-mail your questions to Mike Power, EA, at Mike@PowerInvesting.net by the weekend prior to the session (Mar 14-15) to allow panelists time to research. We will accept electronic questions until about 4:00 p.m. on the day of the meeting. If you don't receive a reply from Mike within 24 hours of submitting a question, check your email and resubmit the question. Thanks again, Mike, for handling the question submission and transcript production.

As in previous years, the questions and answers will be transcribed and sent by e-mail to everyone on the Chapter's news mailing list.

Our panelists:

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

Joe Calderaro, EA, is now a great resource at CSEA, frequently referred to as our "weapon to tax destruction", who previously served time as the IRS Technical Coordinator for the Northern California District, a role in which he provided exceptionally useful guidance on tax law.

With 1 hour of CE on Federal Tax Law Updates, the target audience is: Enrolled Agents, CPAs, CTEC Registered tax preparers, and unenrolled preparers.

PRESIDENT'S MESSAGE

by Patty Pringle, EA, President, EBAEA

Great news! The East Bay Association of Enrolled Agents has a new website! It's now up and running. Check it out at ebaean.org. We now have the capability of adding current information about upcoming events that benefit our members. Because we want the EBAEA website to reflect its members there will be a group photo taken just prior to the March 18th dinner meeting. To be included in the group picture (which will be posted on the EBAEA website as one of the opening pages) please

arrive *no later than 6:00 p.m.* at the Holiday Inn in Dublin on March 18th. Even if you aren't planning on attending the dinner meeting, come to be in the photo.

Now that EBAEA has a new website, it's time to get information out to both the public and membership with our Facebook page. We are seeking an EBAEA member to volunteer to chair and form a Social Media Committee. It's a great way to get involved in the chapter and have fun at the same time. If you are interested please contact me, Patty Pringle, EA at epattypringle@sbcglobal.net.

On Thursday, February 26th, I attended an IRS Issue Management Resolution System (IMRS) teleconference call, led by a team of IRS Stakeholder Liaisons. The purpose of the call is to offer communication between IRS and tax practitioners and for us to report any systemic issues that might have an adverse impact on taxpayers and practitioners. Our area Stakeholder Liaison is a local voice, for communicating with the IRS. While they cannot provide information about an individual taxpayer, they may be able to provide guidance as to who we should call to get the information we need. None of us are comfortable when we don't know who to call for help. Contact information for the Western Area Liaisons is provided at the end of this bulletin. If you would like to participate in the next IMRS teleconference call scheduled for 8:30 AM on Thursday, March 26th, please contact Jennifer Henrie- Brown, at Jennifer.Henrie-Brown@irs.gov. They are aware of the long amounts of time that we are on hold, trying to get through to the Practitioner Hotline.

So, let's speak up about that frustration many of us are feeling, when we call the Practitioner Hotline. Being put on hold, and waiting for over two hours, and then hearing the phone line go dead. There are unavoidably some taxpayer issues that cannot be resolved in eservices or online, so it's imperative that we speak to an IRS Representative. The current problems are detrimental to the taxpayer, and there needs to be a solution.

I plan to write a letter to both the local and national Taxpayer Advocate Offices, and to my representatives in Congress. I am writing to both CSEA and NAEA and asking them to write letters as well. I urge you to do the same. Let them know how strongly you feel. One of the responsibilities we have as Enrolled Agents, and what sets us apart from the rest, is that we are advocates for the taxpayer.

EBAEA ANNUAL MEETING NOTICE

by P. Gail Nanbu, 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 20, 2015 at 6:45 pm at the Dublin Holiday Inn. The business of the Annual Meeting will be to elect Officers and Directors for the 2015-2016 fiscal year.

The EBAEA Nominating Committee has proposed the following slate of candidates for the 2015-2016 fiscal year:

President: Patty Pringle, EA

1st VP: Aida Torres, EA

2nd VP: Sharon Hinchman, EA

Treasurer: Carolyn Krieg, EA

Secretary: P. Gail Nanbu, EA

Immediate Past President: P. Gail Nanbu, EA

Director 2015-2017:

Joanne Anderson, EA

Mary M. Geong, CPA, EA

Gail Stan, EA

Continuing as Directors through 2016:

Peggy Hall, EA

Katherine Judd, EA

Tim Hintzoglou, EA

CSEA Director:

Aida Torres, 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, Gail Nanbu at (925) 943-3993.

MEMBERSHIP COMMITTEE REPORT

by Aida Q. Torres, EA, Membership Chair

With February and Valentines Day behind us, we hope that you found some time to devote to your loved ones – without mentioning taxes, and that you accepted new clients (and returning ones) with open arms!

We're all busy at this point, and there's not a lot in the near future in our membership agenda, but please save the date of August 15, for a chapter event to emphasize recruitment and sharing our knowledge for mutual benefit. In conjunction with the CSEA "Just Ask One" project, we will be working to build our membership (adding even more new members than in the previous fiscal year) and also to share our experience and knowledge to help new members grow and benefit from joining our chapter.

Our chapter has grown and improved, and looks for ways to change for the better. As an example, I hope you will check out the new EBAEA web site, and give your feedback to the Chapter leadership.

Even in this busy season, our membership continues to grow, and please welcome our newest member, Normal Nather, a Professional Associate who joined us on February 27th.

To get more information on coming events, please login to: www.ebaea.org.

If you have recently joined, and your name is not listed, contact Aida, at aida@aidatorres.com or by phone to 510-724-6409. All new members, profes-

sional associates and professional affiliates will receive a packet from CSEA. All new EA members will receive a packet and certificate from EBAEA. If you are a new EA member, and haven't received a packet from the Membership Committee, please let us know.

MEMBERS SPEAK

Upcoming presentations by EBAEA Members include:

April 22: "Basic Payroll," 9 am – 3:30 pm, at 1515 Clay St, Room 9, in Oakland. Mark Bole, mak-bo@pacbell.net.

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

Small Group Tax Meetings

Antioch /Brentwood Fridays 8:00am
Brentwood Café, 8500 Brentwood Blvd, Brentwood
Ken Seamann EA (925) 634-8297

Danville Area 4th Tue 9:30am
Pascals French Oven, 155 Railroad Ave, Danville
Michael Power EA (510) 366-8836

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

Livermore Area Fridays 8:45am
Shari's Restaurant, 1116 East Stanley Blvd, Livermore
Jerrilynn Krebs EA (925) 606-8181

Castro Valley 3rd Tue 8:00am
Carrow's, 2723 Castro Valley Blvd @ Lake Chabot, CV
Dagmar Bedard EA (510) 537-3883

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

QUICKFINDER ORDER TIME !

by Clare Flores, EA

You can still take advantage of our group discount, and our chapter gets a commission on each item you buy. Get an excellent reference for the tax season and support your chapter at the same time. You can order on line at <http://quickfinder.thomson.com>; just be sure to use the discount code Q521. Your order will be shipped directly to you at the price indicated on the form.

Please email clare@taxandpayroll.com if you have any questions or need additional information.

EAs AVAILABLE TO SPEAK

Although our speaker's development group has been dormant in recent months, there are still 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.

BULLETIN ADVERTISING POLICY

by Robert L Seymour, 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 desired text to: EBAEA.Editor@gmail.com.
- 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.

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>

HUMOR

This year, it is important for you to know that the Internal Revenue Service now has a positive, taxpayer-friendly image. What does this mean to you, the individual taxpayer? According to [the Head of the IRS] it means you are now expected to tip: "If you're a married taxpayer filing jointly, tucking a \$50 bill inside your tax return will definitely cause the IRS employee serving you to feel appreciated and be less likely to select you for the auditing procedure we call 'The Closet Full of Snakes.'" --Dave Barry

The audit partner, the tax partner and the senior partner of a CPA firm go out to lunch. On the way, they see a brass lamp in the gutter, pick it up and give it a rub. Instantly, a genie appears who offers each of them one wish.

The audit partner says, "Take me to the Cayman Islands, give me a hot young tennis coach, and endless supply of scotch, and leave me there!" Poof! He was gone in a puff of smoke.

The tax partner tells the genie, "Take me to the Bahamas, give me a hot young massage therapist and an endless supply of offshore tax schemes, and leave me there!" Poof! With a flash of light and a puff of smoke, he was gone.

The genie turns to the senior partners and says, "And what do you want?" He responds, "I want those two back in the office right after my lunch."

April 15 is lurking around the corner, so if you have yet to file your federal tax return, it is time to set aside a few hours, gather your financial records, and flee the country. -- Dave Barry

A story relayed by the Internal Revenue Service call center agents: Taxpayers sometimes call in to complain that they've mistakenly received letters intended for someone named "Levy".

-- Gadi Dechter, Government Executive, May 2011

When it comes to finances, remember that there are no withholding taxes on the wages of sin. – Mae West

CSEA ONLINE LEARNING

The CSEA **Learning Portal** offers exceptional tax education, on demand.

Did you miss SuperSeminar last year? Is there a SuperSeminar session you wanted to attend but conflicted with the one you chose? What about a client matter that just came up and you're not sure how to handle it?

CSEA offers online replays of SuperSeminar presentations from 2012 to 2014. This is a great refresher, or a primer for a subject on which you need more info.

Go to www.csea.org and mouse over the "Education & Events" tab, then mouse down and click on "Online Learning Portal". You won't be sorry...

In addition to the Online Learning Portal, check out CSEA's **digiTAX Webinars**, under the same "Education & Events" tab.

As the website says, "CSEA's newest digiTAX offering Building Blocks are hands-on pen-to-paper extensive and complete and deliver the fundamental tax knowledge you need to either refresh an already established career or kick-start a successful career as a tax professional. This year's suite of Building Blocks offerings explore Schedules A, B, C, D and E, taking you line by line from start to finish – you can take all five webinars at a special bundled price or take a few – the choice is yours."

Most recently, as covered in the new January 2015 issue of California Enrolled Agent, CSEA has partnered with the California Society of CPAs to make available **webcasts** on a variety of topics of interest to EAs, some with CE credit, others to enrich our professional expertise.

CALENDAR OF EVENTS

March 2015

**18 EBAEA Dinner Meeting:
IRS Tax Panel**

May 2015

**12-14 CSEA Super Seminar in Las Vegas
28-30 CSEA Super Seminar in Reno**

2014 - 2015 Board of Directors and Committee Chairs

Web Page <http://www.ebaea.org> Bulletin editor: EBAEA.Editor@gmail.com. (Robert L Seymour, EA)

President: Patty Pringle, EA 510-912-1682
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: P Gail Nanbu, EA 925-943-3993
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Sal Romo, EA 510-471-9492
Marjorie Williams-Jones, EA 510-482-6204
Director 2014 – 2015:
Katherine Judd, EA
Peggy Hall, EA 510-388-1040
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Communication Committee (2nd VP)

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Quickfinders: Clare Flores, EA 510-785-8356
Social Affairs: Luciann Leraul, CPA 925-518-9076
Social Affairs: Carolyn Krieg, EA

Website: Patty Pringle, EA 510-912-1682
IRS Practitioner Panel: Phil Fiegler, EA 510-530-1174
CTEC Panel: Walt Thomas, EA 510-487-1691

Education Committee (1st VP)

Chair: Al Wise, EA 707-634-4TAX
Continuing Ed: vacant
Educ. Coord.: M. Williams-Jones, EA 510-482-6204
Mini Seminar Team: Patty Pringle, EA 510-912-1682
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: P Gail Nanbu, EA 925-943-3993
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
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Nominating: P Gail Nanbu, EA 925-943-3993
Volunteer Coordinator: Patty Pringle, EA 510-912-1682

EAST BAY ASSOCIATION OF ENROLLED AGENTS

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(800) 617-1040 or (925) 320-7802 fax (925) 553-3515 email: ebaea@ebaea.org

If you haven't already done so, please note the current address for the East Bay Association of Enrolled Agents:

EBAEA
6400 Village Parkway, Suite 201
Dublin, CA 94568-3006

IRS Stakeholder Liaison Contacts

Name	Location	E-mail Address	Phone Number
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