NEXT MEETING: Wed., Dec. 12, 2018

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!)

No Board Meeting

6:30 Holiday Party

Cost: $20.00 at the door – cash or check

TOYS FOR TOTS

Please bring your unwrapped toy for Toys for Tots to the November or December meeting and the Chapter will give you a glass of wine to go with the finger food at the December Mixer.

Every year for the last 200 years (maybe only 20 years) Joanne Anderson has collected toys to bring to the Fire Stations for distribution. This is a great way for us to contribute as a chapter. If you have any questions, please contact Joanne at 925-938-9086. Thank you for your participation.

HOLIDAY PARTY

EBAEA Holiday Party Wednesday, December 12th. Please join us for a joyous and fun time. Be sure to wear your Ugly Holiday Sweater. Prize will be given to the ugliest sweater. We will also have an “Ice Breaker” game with a prize. Appetizers will be served. Bring a “toy for a tot” (at least $10.00 value and unwrapped) and receive a complimentary glass of wine. No talking taxes; this is an opportunity to get to know your colleagues as people. No CE given this evening just fun, fun, fun!! The cost is $20.00 (each) bring a guest also for $20.00.

Ugly Sweater Contestants from last year

PRESIDENT’S MESSAGE

by Gail Stan, EA, MBA, MLS

A big Thank You to Terri Malone from the IRS on “Identity Data Compromise” at our November dinner meeting. She provided a lot of really good information and links to more on the IRS web site.

The December Mixer last year was a lot of fun, so we are going to do it again this year. The date has also been moved to a week earlier than normal and will be on December 12 at the Holiday Inn. And bring an unwrapped toy for “Toys for Tots” and get a complimentary glass of wine at the December Mixer. See the article above for more details.
Since this is a combined 2-month bulletin, I need to mention our upcoming activities for January:

5-6 CSEA Committee Meetings & Board Meeting - Sacramento
7 Jim Stern Legislative Day - Sacramento
16 EBAEA Dinner - Dublin Holiday Inn
Topic – IRS & Cryptocurrency and How to read a Tax Treaty
Speaker – Steven L. Walker, Attorney
26 Tax Help Day at the Pleasanton Farmer’s Market

We are putting together our expert panel for Federal and State for February and March. Any Burning questions to answer? Make a list! Both months are always filled with a lively discussion.

Many of you know that our 1st VP Cheryl Meder, EA has been dealing with some health issues which necessitated her resignation as our CSEA Director. So, at the November Board meeting, as provided for in the By-laws, the Board appointed Sharon Hinchman, EA as the CSEA Director and she was sworn in at the November Dinner meeting. Please keep Cheryl in your thoughts and prayers through this difficult time for her.

And please remember. This is your chapter. If there is something you would like to see happen, let me know. I’m always open to suggestions.

MEMBERS SPEAK
Upcoming presentations by EBAEA Members include:

12/19/18 – Michele Zimmerman – Federal/State Basic Payroll Tax – 9 am - 3 pm, Elihu M. Harris State Building 1515 Clay Street Oakland, CA

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.

TAX HELP DAY – JANUARY 26

Tax Help Day is a FREE Public Service Event sponsored by the California Society of Enrolled Agents (CSEA) and its 19 Chapters.

Local Enrolled Agents, “America’s Tax Experts,” will be available to answer your questions on a wide variety of tax topics like the Affordable Care Act, running your own business, buying a home, getting married, and much more.

• What: Tax Help Day – East Bay, a free public service sponsored by the California Society of Enrolled Agents (CSEA) and its 19 Chapters
• When: January 26, 9am to 1pm
• Where: Pleasanton Farmers Market, 77 W Angela St., Pleasanton
• Who: Contact Gail Stan, Enrolled Agent (EA), (925) 336-0589, gail@gailstantaxes.com
• Why: Local Enrolled Agents, “America’s Tax Experts,” will be available to answer your questions on a wide variety of tax topics like casualty losses from recent natural disasters, Tax Reform, the Affordable Care Act, running your own business and much more.

ORDER YOUR QUICKFINDER

Order your Quickfinder through the Chapter and we receive a percentage of the total orders placed. Claire Flores clare@taxandpayroll.com is the contact and the order forms are at the end of this Bulletin.

Safe & Happy Holidays
Join a small group meeting!

Small Group Tax Meetings

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

**Danville Area**  
2nd Tue 8:30 am (NEW)  
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**  
Fridays 8:45 am  
No permanent meeting place at the moment  
Jerrilynn Krebs EA  
(925) 606-8181

**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

December 2018

12  
**EBAEA Mixer - Dublin Holiday Inn**  
This is a new date for this meeting  
Not a regular meeting, this will be a Mixer with heavy appetizers. Bring a toy for Toys for Tots and receive a glass of wine from the Chapter. We will also have a competition for the “Ugliest Christmas Sweater.”

25  
Christmas

January 2019

1  
New Year’s Day

5-6  
CSEA Committee Meetings & Board Meeting - Sacramento

7  
Jim Stern Legislative Day - Sacramento

16  
**EBAEA Dinner - Dublin Holiday Inn**  
Topic – IRS & Cryptocurrency and How to read a Tax Treaty  
Speaker – Steven L. Walker, Attorney

February 2019

20  
**EBAEA Dinner - Dublin Holiday Inn**  
Topic – CA Tax Panel

March 2019

20  
**EBAEA Dinner - Dublin Holiday Inn**  
Topic – Federal Tax Panel

April 2019

No Meeting – Everyone is too Busy!
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.
### 2018 - 2019 Board of Directors and Committee Chairs

**President:**
- Gail Stan, EA  
gail@gailstantaxes.com

**1st VP:**
- Cheryl Meder, EA  
cmeder5@gmail.com

**2nd VP:**
- Patty Pringle, EA  
patty@eastbaytaxmatters.com

**Treasurer:**
- Lourdes Rabara, EA  
lrabara@aol.com

**Secretary:**
- Katherine Judd, EA  
kjuddea@gmail.com

**Immediate Past President:**
- Sharon Hinchman, EA  
sharon@alamo-tax.com

**Director 2018 – 2020 (2 year):**
- Carolyn Krieg, EA  
ckrieg111@msn.com
- Sassa Oznowicz, EA  
krokholm@gmail.com
- Aida Torres, EA  
Aida@AidaTorres.com

**Director 2018 – 2019 (1 year):**
- Peggy Hall, EA  
halloftaxes@gmail.com

**CSEA Director:**
- Sharon Hinchman, EA  
sharon@alamo-tax.com

**Communication Committee**
- **Chair:** Gail Stan, EA  
gail@gailstantaxes.com
- **Bulletin:** Gail Stan, EA  
EBAEA.Editor@gmail.com
- **Disaster Services:**
  - Jan Bridges, EA  
  jan_bridges@comcast.net
- **IRS Practitioner Panel:**
  - Phil Fiegler, EA  
  pf@philtax.com
- **Legislative:** Linda Fox, EA  
  fox4tax@aol.com
- **Membership:**
  - Sharon Hinchman, EA  
  sharon@alamo-tax.com
  - Joanne Anderson, EA  
  jander3812@aol.com
- **PIA:** Cheryl Meder, EA  
  cmeder5@gmail.com
- **Practice Preservation:**
  - Linda Fox, EA  
  fox4tax@aol.com

**Quickfinders:**
- Clare Flores, EA  
clare@taxandpayroll.com

**Website:**
- Patty Pringle, EA  
patty@eastbaytaxmatters.com

**Education Committee**
- **Chair:** Sharon Hinchman, EA  
sharon@alamo-tax.com
- **Continuing Education:**
  - Katherine Judd, EA  
kjuddea@gmail.com
- **Education Coordinator:**
  - Marjorie Williams-Jones, EA  
Marj@MarjTax.com
- **Mini Seminar Team:**
  - Patty Pringle, EA  
patty@eastbaytaxmatters.com
- **Program:** Peggy Hall, EA  
halloftaxes@gmail.com
- **SEE Class:** vacant
- **Tax Talk:**
  - Patty Pringle, EA  
patty@eastbaytaxmatters.com
- **Town Hall:**
  - Patty Pringle, EA  
patty@eastbaytaxmatters.com

**Administration Committee**
- **Chair:** vacant
- **Bylaws/SOP:** Gail Stan, EA  
gail@gailstantaxes.com
- **Audio/Visual Technical Advisor:**
  - Eric Vale  
eric@vale-tax.com
- **Chapter Office Administrator:**
  - Patty Pringle, EA  
patty@eastbaytaxmatters.com
- **Chapter Office Liaison:**
  - Dagmar Bedard, EA  
tax@dagmarbedard.com
- **Financial Review:**
  - Gail Stan, EA  
gail@gailstantaxes.com
- **Nominating:**
  - Sharon Hinchman, EA  
sharon@alamo-tax.com
- **Volunteer Coordinator:**
  - Gail Stan, EA  
gail@gailstantaxes.com

---

**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](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**
6880 Regional St.  
Dublin, CA 94568
BUY MORE, SAVE MORE.
Save up to 20% on your trusted Quickfinder resources*

The Quickfinder Build Your Own Bundle is the best value for your budget. With our quantity discount pricing, you can choose the Quickfinder products you want in the quantities and formats you need to build your perfect tax quick-reference library.

<table>
<thead>
<tr>
<th>Order Quantity</th>
<th>ORDER by 4/15/19</th>
<th>Save up to 20%*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>-7%</td>
</tr>
<tr>
<td>3 - 5</td>
<td></td>
<td>-12%</td>
</tr>
<tr>
<td>6 - 10</td>
<td></td>
<td>-15%</td>
</tr>
<tr>
<td>11 - 20</td>
<td></td>
<td>-17%</td>
</tr>
<tr>
<td>21+</td>
<td></td>
<td>-20%</td>
</tr>
</tbody>
</table>

Visit tax.tr.com/CSEAEB to take advantage of your special pricing and build your perfect tax quick-reference library.

PRODUCT UPDATE POLICY
**Automatic Renewals: Select products identified with ** herein are eligible to automatically renew. By checking 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 to cancel subscriptions or to return products may be mailed to Thomson Reuters (Tax & Accounting) Inc., Customer Service Department, P.O. Box 115008, Carrollton, TX 75011-5008 or by calling +1 800 431 9025, option 2. If tangible product(s) need to be returned, a prepaid return shipping label will be provided upon request.

CUSTOMER INFORMATION

Customer number ____________________________

Company name ____________________________

(If P.O. Box, please include physical address for UPS.)

Name ____________________________

Address ____________________________

City, State, ZIP ____________________________

PAYMENT INFORMATION

Make checks and money orders payable to Quickfinder

☐ Check  ☐ Credit card

Note: The charge on your credit card statement will appear as TTA-Research & CPE.

Credit card account # ____________________________

☐ Visa  ☐ MasterCard  ☐ Discover  ☐ AMEX

CC payments — Note: Our policy is to charge your credit card at the time of order.

Expiration date: ____________________________

Month  Date

Cardholder's name (printed as it appears on card) ____________________________

Cardholder’s signature ____________________________
# Quickfinder Handbooks and Quick Reference Guides

## Tax Preparation Tools

<table>
<thead>
<tr>
<th>Item</th>
<th>List Price</th>
<th>Order Quantity</th>
<th>Order Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Example Product</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1040 Quickfinder Handbook</td>
<td>$55</td>
<td>$51</td>
<td>$58</td>
</tr>
<tr>
<td>Small Business Quickfinder Handbook</td>
<td>$55</td>
<td>$51</td>
<td>$58</td>
</tr>
<tr>
<td>Premium Quickfinder Handbook</td>
<td>$77</td>
<td>$73</td>
<td>$80</td>
</tr>
<tr>
<td>All States Quickfinder Handbook</td>
<td>$85</td>
<td>$81</td>
<td>N/A</td>
</tr>
<tr>
<td>Individuals — Special Tax Situations Quickfinder Handbook</td>
<td>$55</td>
<td>$51</td>
<td>N/A</td>
</tr>
<tr>
<td>Depreciation Quickfinder Handbook</td>
<td>$55</td>
<td>$51</td>
<td>N/A</td>
</tr>
<tr>
<td>Laminated Tax Tables for Individual Returns</td>
<td>$16</td>
<td>$12</td>
<td>N/A</td>
</tr>
<tr>
<td>Laminated Tax Tables for Business Returns</td>
<td>$16</td>
<td>$12</td>
<td>N/A</td>
</tr>
</tbody>
</table>

## Tax Planning Tools

<table>
<thead>
<tr>
<th>Item</th>
<th>List Price</th>
<th>Order Quantity</th>
<th>Order Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care Reform Quickfinder Handbook</td>
<td>$55</td>
<td>$51</td>
<td>N/A</td>
</tr>
<tr>
<td>Quickfinder Annual Tax Update</td>
<td>$55</td>
<td>$51</td>
<td>N/A</td>
</tr>
<tr>
<td>Tax Planning for Individuals Quickfinder Handbook</td>
<td>$55</td>
<td>$51</td>
<td>N/A</td>
</tr>
<tr>
<td>Social Security and Medicare Quickfinder Handbook</td>
<td>$55</td>
<td>$51</td>
<td>N/A</td>
</tr>
<tr>
<td>IRA and Retirement Plan Quickfinder Handbook</td>
<td>$55</td>
<td>$51</td>
<td>N/A</td>
</tr>
<tr>
<td>Quickfinder Tax Tips Newsletter**</td>
<td>$71</td>
<td>$68</td>
<td>N/A</td>
</tr>
</tbody>
</table>

## Quickfinder Order Totals

<table>
<thead>
<tr>
<th>Total Product Order $</th>
<th>Order Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$110</td>
<td>$255</td>
</tr>
<tr>
<td>$348</td>
<td>$773</td>
</tr>
</tbody>
</table>

**Quickfinder Order Totals**

**| **| **| **| **| **|
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>**</td>
<td>**</td>
<td>**</td>
<td>**</td>
<td>**</td>
</tr>
</tbody>
</table>

## Calculate Your Quickfinder Order Discounts and Shipping Charges

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 below
4. Calculate shipping for Quickfinder — $6.00/Handbook — $3.50/Tax table
5. Calculate Quickfinder order total — Add amounts from steps 2, 3, and 4.

<table>
<thead>
<tr>
<th>Order Quantity</th>
<th>ORDER by 4/15/19</th>
<th>Save up to 20%*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>-7%</td>
<td></td>
</tr>
<tr>
<td>3 – 5</td>
<td>-12%</td>
<td></td>
</tr>
<tr>
<td>6 – 10</td>
<td>-15%</td>
<td></td>
</tr>
<tr>
<td>11 – 20</td>
<td>-17%</td>
<td></td>
</tr>
<tr>
<td>21+</td>
<td>-20%</td>
<td></td>
</tr>
</tbody>
</table>

**QUICKFINDER ORDER TOTALS**

**| **| **| **| **| **|
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>**</td>
<td>**</td>
<td>**</td>
<td>**</td>
<td>**</td>
</tr>
</tbody>
</table>

## Calculate Your Combined Order Totals And Shipping Charges

6. Sales tax (apply your rate)
7. Grand total