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

June 2018

NEXT MEETING: Wed., June 20, 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!

4:30 Board Meeting
6:30 Dinner Buffet
7:00 Program: “IRS Appeals Process”

Cost: $40.00 with reservation by Monday, June 18
$50.00 with reservation after deadline

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.

June Dinner Meeting: The IRS Appeals Process
Speaker: David Fogel, EA, CPA, USTCP

Mr. Fogel will cover a thorough review of the appeals process. Procedures and pitfalls. Mr. Fogel will cover IRS' motive with appeals (to resolve tax controversies without litigation), then take us through good practices for determining the best approach. Areas covered will include (1) alternatives such as SB/SE Fast Track Settlement, Fast Track Mediation, (2) the different routes to Appeals, (3) preparing the request from a 30-Day Letter and a 90-Day Letter, (4) working with Appeals Officers -- how best to reach a settlement, even when you don't agree. The presentation will include examples of Requests to the IRS. The session will be 2 hours of CE.

David Fogel Bio
David Fogel is licensed by the California Board of Accountancy as a Certified Public Accountant. In addition, he is licensed by the Internal Revenue Service as an Enrolled Agent. And is also one of the few non-attorneys admitted to practice before the United States Tax Court.

He provides tax consulting services (advice and tax research) to other tax professionals who prepare returns and who represent clients in Federal and California tax disputes. David also represent clients before IRS Appeals and Tax Court.

Over the past few years, David has also provided individual clients and other tax professionals with analyses of the income tax consequences of foreclosures, short sales, bankruptcy or other debt cancellation transactions.

PRESIDENT'S MESSAGE
by Sharon Hinchman, EA, NTPI Fellow

So Long, Fair Well, but not Goodbye.

It’s June and time for me to turn the gavel over to Gail Stan and her new board. To all my officers and board I say a big thanks for making this year a good one. I also want to take this opportunity to thank some of the non-board members without whom this chapter would not function very well.

To our front desk greeters and CE reporters, Joanne Anderson and Marjorie Williams-Jones. To Dagmar Bedard who takes care of our audio, our monthly meetings wouldn’t be the same without you. THANK YOU!

There are many others who sit on panels, gather questions for the panels, pick up speakers from the airport, run breakfast meetings and the email forum, and so many behind the scenes things that make an organization run---THANK YOU!

There will be a recap of our chapter events for the last year in the CSEA Annual Meeting Report. I encourage you all to take a few minutes to look back at what East Bay has done and check out what other chapters are doing.
I have been a member of this chapter since 1981. It has been an honor to serve as your President.

And it is the beginning for our officers for the 2018-2019 fiscal year (which begins July 1) unanimously elected at our May Annual Membership Meeting:

- President: Gail Stan, EA, MBA, MLS
- 1ST VP: Cheryl Meder, EA
- 2ND VP: Patty Pringle, EA
- Treasurer: Lourdes Rabara, EA
- Secretary: Katherine Judd, EA
- Immediate Past President: Sharon Hinchman, EA, FNTPI

Directors 2017 – 2019
- Peggy Hall, EA
- Continuing as Directors through 2018
- Carolyn Krieg, EA
- Suzanne Oznowicz

We have 3 unfilled Director positions if anyone would like to volunteer to be on the Board

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**Save the Date “Tax Talk 2018”**
*By Patty Pringle, EA, Seminar Chair*

The East Bay Association of Enrolled Agents Annual Fall Seminar Tax Talk 2018 will be held at the Holiday Inn Dublin, CA on October 29th, 30th and 31st – this is Monday, Tuesday and Wednesday – not our normal, but these dates worked best for our speakers.

Once again, we have lined up excellent speakers:

- Beanna Whitlock, EA will present 2 hours of “Ethics” and topics to be determined
- Vicki Mulak, EA – topics to be determined
- Lisa Ihm – topics to be determined

So, stay tuned, Additional information will be in the July Bulletin.

This is a chapter sponsored event and all proceeds go back to the chapter and are used for other special events and programs for EBAEA Members. This event would not be possible without the hard work of the many volunteers that make it happen. Please let me know if you would like to join in and volunteer (you might even have fun). Your help will be greatly appreciated!

Patty Pringle, EA patty@eastbaytaxmatters.com

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**DINNER SUBSCRIPTIONS AVAILABLE**

With the beginning of our new fiscal year, we are once again offering the popular dinner subscription. This plan grants you automatic reservation at all 11 Chapter dinner meetings for one locked-in price, so you are immune to any price increases due to different venues, additional CE offered, etc. You pay for nine regularly-priced meetings ($360) and get all eleven dinners (value $440).

This plan is only offered through our August meeting and takes your summer vacation into consideration. Enrolling before the July meeting assures you all eleven meetings for $360. Enrolling after the July meeting and before the August meeting assures you ten meetings for $360; which still gives you a free dinner.

To enroll, either fill out the Subscription Form here, and send it along with a check so the Chapter Office receives it at least a week before the meeting which starts your subscription or sign up online here as normal and bring a check for the remaining amount to the dinner meeting.

The Board of Directors requests that if you are not able to make a meeting, please contact the chapter office and cancel or say who is attending in your place. There are no refunds for dinners not used. If you have any questions, please email the Chapter Office info@ebaea.org

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We are still looking for someone to volunteer for the following position:

- **Audio/Visual Technical Advisor** – Dagmar Bedard, EA has held this position for the past several years and has tendered her resignation effective August 31, 2018.

  - This position takes care of the microphones and projector used at our monthly meetings so needs to be someone who will be at all the meetings. Contact Dagmar if you have any questions.
MEMBERS SPEAK
Upcoming presentations by EBAEA Members include:

06/12/18 – Mark Bole – Basic Payroll 9 am – 3 pm
Concord, 4071 Port Chicago Highway, Suite 250

08/08/18 – Michele Zimmerman – Basic Payroll 9 am – 3 pm, San Francisco, 745 Franklin Street, 4th Floor Conference Room

June 2018

17 Father's Day

20 EBAEA Dinner - Dublin Holiday Inn
Installation of Officers
Topic – IRS Appeals Process
Speaker - David M. Fogel, EA, CPA, USTCP

24-26 CSEA Annual Meeting & Board Meeting – Reno, NV

27-29 CSEA Super Seminar – Reno, NV

July 2018

18 EBAEA Dinner - Dublin Holiday Inn
Topic – Section 199 A
Speaker – Jim Leet, Attorney

August 2018

15 EBAEA Dinner - Dublin Holiday Inn
New Member “Meet & Greet”

September 2018

19 EBAEA Dinner - Dublin Holiday Inn
Member Appreciation

22-23 CSEA Committee & Board Meetings
Sacramento

October 2018

17 EBAEA Dinner - Dublin Holiday Inn

29-31 EBAEA Tax Talk Seminar – Dublin Holiday Inn

MEMBER PROFILE

Name: Dagmar Bedard
Year became EA: 2002
Location of practice: Castro Valley, CA
# of Employees: I alone wear all the hats required to run a successful business
Education: BA International Relations, UC Davis
Tax Specialization(s): Individuals
How/Why became EA: Self-employed since 1990, I initially took a tax course to learn whether or not I was preparing my own taxes correctly. After completing the course, I was offered a job and took it (for a year I told myself) to cement the tax knowledge in my head. So fast forward and 7 years later, I was still working as a tax preparer and really enjoying my work with clients. I earned my EA designation to up my game and show that I was a professional.

What do you like best about being an EA: I consider myself successful when I’ve taught a client what the forms mean and how the numbers relate to his life. I have always run my businesses solely on personal referrals and am proud when a client feels confident in me and sends me their family and friends.

What do you like least about being an EA: As a sole proprietor, I struggle with the long hours during peak season. And if I am going to complain about anything, unorganized, late, and “needy” clients are a pain.

Former officer of EBAEA – Position(s) & year(s): PIA Director, 2006-2008, Audio/Visual Tech 2013-2018

Anything else: I worked for HRB for seven years and a small tax practice for three years. After the practice was sold, I moved into my home office and have been seeing clients and preparing taxes here since 2007.

My two dogs and two cats are my official greeters. I find they lighten the mood, in fact, if my “kids” are not around, I get asked if they can see them. Sometimes, I feel I’m the afterthought and they really come to see my animals.

Before setting out on my own, I’ve worked for businesses in law, railroad, utility, hotel management, and commercial property management.

I was born in Canada and immigrated to California as a child. We settled in Fairfield where I did most of my growing up. My family is German and my first flight was to Germany when I was 9 months old. That must be the source of my traveling bug; just tell me when and where and my bag is packed!

My wonderful (and soooo supportive and understanding during season) husband Lu and I live in Castro Valley and enjoy reading, gardening, and planning our next adventure.
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.

Small Group Tax Meetings

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

**Danville Area**  
2nd Tue 8:30 am (NEW)  
Faz Bakery and Coffee Bar, 221 Hartz Avenue, Danville  
(Temporary location)  
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  
Shari’s Restaurant, 1116 East Stanley Blvd, Livermore  
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

**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.
### Board of Directors and Committee Chairs

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

**1st VP:**
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gail@gailstantaxes.com

**2nd VP:**
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**Treasurer:**
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**Immediate Past President:**
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**Chair:**
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**Legislative:**
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**Education Coordinator:**
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**Mini Seminar Team:**
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**Program:**
Peggy Hall, EA  
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**SEE Class:**
vacant

**Tax Talk:**
Patty Pringle, EA  
patty@eastbaytaxmatters.com

**Town Hall:**
Patty Pringle, EA  
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**Administration Committee**
**Chair:**
vacant

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**Chapter Office Administrator:**
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**Chapter Office Liaison:**
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**Nominating:**
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aida@aidatorres.com

**Volunteer Coordinator:**
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sharon@alamo-tax.com

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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

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**EAST BAY ASSOCIATION OF ENROLLED AGENTS**
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Bulletin editor: EBAEA.Editor@gmail.com. (Gail Stan, EA)
Web Page [http://www.ebaea.org](http://www.ebaea.org)
Name: 

Year you became an EA: 

NTPI Fellow: 

Location of your practice (city): 

Number of Employees in your practice: 

Education: 

Tax Specialization(s): 

How/Why did you become an EA? 

What do you like best about being an EA? 

What do you like least about being an EA? 

Have you previously been an officer of EBAEA? What position(s) and year(s)? 

Have you been an officer of CSEA and/or NAEA? What position(s) and year(s)? 

Anything else you would like the members of EBAEA to know about you?