March / April 2019

NEXT MEETING: Wed., Mar. 20, 2019
Place: Dublin Holiday Inn
6680 Regional St., Dublin, CA 94568
(go to http://www.holidayinn.com/hotels/us/en/dublin/ dumb/hoteldetail#Directions) or take BART!

4:30 Board Meeting
6:30 Dinner Buffet
7:00 Program: “Federal Tax Panel”

Cost: $40.00 with reservation by Monday, Mar. 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 ebea@ebaea.org (preferred) or call 800-617-1040.

March Session: Federal Tax Panel
Speakers:
Joe Calderaro, EA, Karen Brosi, EA,
and Sharon Kreider, CPA, 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. The session will be 2 hours.

Submit your most challenging questions! The panelists will first answer and discuss questions submitted in advance by attendees. Maximize your free research by getting your Federal questions to Mike Power early. The panelists will research your question for you! But we must be courteous and give them as much lead time as possible.

If time allows, questions submitted at the dinner will be addressed, but questions that were submitted in advance by email will be considered first.

Please send your panel questions to our scribe, Michael Power, CFP, EA at mpower@powerinvesting.net. (Friday or Sat prior to the Wed meeting is best.) Mike will accept all questions right up to about 2 hours before the meeting. You can also submit at the meeting, but time limits might mean your Q is not A’d. The Questions and Answers are usually blasted out to attendees within a week of the meeting. If you have a pressing need for a faster write up, email Mike directly as he has usually composed the Q&A by Friday.

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 practicing in Silicon Valley for over 25 years. Prior to establishing her own firm, Sharon worked for the IRS.

Sharon Kreider 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

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

If you are all as busy as I am, you may not even take the time to read this newsletter, but I hope you will as we hope it provides useful information for you.

Our February meeting was our annual CA Tax Panel with Karen Brosi, EA and Susan Maples Taxpayers' Rights Advocate with the Franchise Tax Board (FTB). These ladies did a fabulous job of answering our CA questions and even answered some 199A questions.

I am sure there will be many more 199A 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 15 which is also our Annual Meeting and Election of Officers. East Bay is an all-volunteer organization; officers commit to spending the time necessary to run the organization. The following positions need to be filled for the 2019-2020 governance year:

- President
- 1st Vice President
- 2nd Vice President
- Secretary
- Treasurer
- CSEA Director
- Directors

If you have an interest in being an officer, please contact Sharon Hinchman, Nominating Committee Chair or Gail Stan. Our contact info is later in this Bulletin.

COUNTME IN!

5 Reasons Why You Should Volunteer

Posted Mar 12, 2014
Dawn C. Carr MGS, Ph.D.
The Third Age
In Psychology Today

The Bureau of Labor Statistics just released the 2013 volunteering rates for the United States, showing a decline to 25.4 percent, the lowest rate since the survey was first administered in 2002. These rates reflect adults in the US who spent as little as one hour volunteering for an organization in the last 12 months. Adults who regularly volunteer make up only a small fraction of this group. Some suggest that the decline in volunteering is due in part to the struggling economy; people are focusing on getting and maintaining adequate paid work and don’t feel they have time to think about unpaid work. However, volunteering isn’t something to put off until you have extra time and money. There are numerous reasons why the returns far outweigh the time you invest, especially during lean times. I’ll point out just five reasons you should consider making volunteering a part of your everyday life.

1. Volunteers live longer and are healthier.
Volunteers are happier and healthier than non-volunteers. In fact, during later life, volunteering is even more beneficial for one’s health than exercising and eating well. Older people who volunteer remain physically functional longer, have more robust psychological well-being, and live longer. However, older people who volunteer are almost always people who volunteered earlier in life. Health and longevity gains from volunteering come from establishing meaningful volunteer roles before you retire and continuing to volunteer once you arrive in your post-retirement years.

2. Volunteering establishes strong relationships.
Despite all of the online connections that are available at our fingertips, people are lonelier now than ever before. Indeed, a 2010 AARP study reported that prevalence of loneliness is at an all-time high, with about one in three adults age 45 or older categorized as lonely. Online connections, while useful for maintaining existing relationships, are not very helpful in establishing lasting, new ones. Working alongside people who feel as strongly as you do about supporting a particular cause creates a path to developing strong relationships with others. It isn’t
just beneficial for making new friendships either. Volunteering alongside other members of your family strengthens family bonds based in “doing” your values. And these benefits have a ripple effect. Children who volunteer with their parents are more likely to become adults who volunteer.

3. **Volunteering is good for your career.**
People who volunteer make more money, partially because the relationships people create while volunteering can be leveraged for financial benefit. In 1973, a John’s Hopkins Sociologist named Mark Granovetter described the important role of “weak ties.” Weak ties are those relationships that are outside of one’s close-knit social network. These relationships are important because they provide access to new information and opportunities. People in your close network provide redundant information—they are already participating in the same kinds of activities and know the same people. Volunteering has long been viewed as a way to create new “weak tie” connections that lead to career opportunities. Volunteering in your current career industry—or an area you’d like to transition into—is an especially effective way to leverage social connections for career gain.

4. **Volunteering is good for society.**
Many businesses, and almost all mission-driven organizations, are successful only if they maintain a strong volunteer workforce. In fact, places like museums, social service organizations, and faith-based organizations often rely on more volunteers than paid workers to meet their goals and fulfill their mission. These businesses are committed to doing good things for society. They pick up the pieces where government programs leave off, and by volunteering for these organizations, you participate in helping our society meet the needs of people from all walks of life. For example, The Borgen Project, a campaign committed to addressing the problem of global poverty, relies on volunteers who commit several hours a week for a period of six months or longer, to help with raising awareness, fundraising and mobilization of human and fiscal resources (http://borgenproject.org/). With the help of volunteers, the Borgen Project has been very successful in raising awareness and influencing legislation to actively make positive changes that directly affect the lives of the world’s poorest citizens.

5. **Volunteering gives you a sense of purpose.**
Although it is not well-understood why volunteering provides such a profound health benefit, a key factor is assumed to be that volunteering serves to express and facilitate opportunities to carry out one’s sense of purpose. The very nature of volunteering means choosing to work without being paid for it. As a result, people choose to spend their time on issues they feel strongly about. If you are greatly concerned about the treatment and well-being of animals, for example, volunteering at an animal shelter will help you address a social problem that is meaningful to you.

If you aren’t currently volunteering, and three in four of us aren’t, there are many resources online that can help you find an opportunity. Committing even as little as one hour a week can have a profound benefit on your own life, and the organizations that rely on such help will be able to thrive. Check out [www.volunteermatch.org](http://www.volunteermatch.org), [www.serve.gov](http://www.serve.gov), [www.allforgood.org](http://www.allforgood.org), [www的理想ist.org](http://www理想ist.org), or go directly to an organization that you support and ask them what you can do to help. You’ll get more back than you ever imagined.

### Thank You Marjorie Williams-Jones!

Past President Sharon Hinchman, EA, NTPI Fellow finally got a chance to present Marjorie Williams-Jones, EA with her “Thank You” plaque for her contribution to the running of our chapter by requesting the CE numbers for all of our presentations and preparing the chapter’s annual tax return.

### 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.
Join a small group meeting!

**March 2019**

20  EBAEA Dinner - Dublin Holiday Inn  
Topic – Federal Tax Panel  
Panelists: Karen Brosi, EA, Sharon Kreider, EA, CPA and Joe Calderaro, EA

**April 2019**

No Meeting – Everyone is too Busy!

**May 2019**

15  EBAEA Dinner - Dublin Holiday Inn  
Annual Meeting & Election of Officers

**June 2019**

19  EBAEA Dinner - Dublin Holiday Inn  
Installation of Officers

24-25  CSEA Annual Meeting & Board Meeting –  
Reno, NV

26-28  CSEA Super Seminar – Reno, NV

**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  
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**  
2nd & 4th Thurs 8:45 am  
Brick Café, 833 E. Stanley Blvd., Livermore (New)  
Allison Johnson, EA  925-518-0882

**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

**RESOURCES AVAILABLE**

New IRS Taxpayer Advocate Service website  
https://www.irs.gov/taxpayer-advocate

CSEA website now has a tutorial for how to use -  
14-minute YouTube video

**Only 39 more days to go!**
**Update on the NAEA Affiliate Agreement**
*By Cynthia Leachmoore, EA, CSEA President*

As you know, CSEA has been working with NAEA to amend the proposed NAEA Affiliate Agreement that contained multiple areas of concern for our organization. In the past few months, NAEA has listened to our concerns - and those of other Affiliates - and has revised the document in both tone and content, giving CSEA most of what we asked for.

The revised agreement was received after the Board met in January. It has been sent to the Board for their review and is available for download for your review as well.

There is one issue that we asked NAEA for that is left to be negotiated -- dues collection. An additional uncontested issue has become relevant in light of declining membership renewals at both the State and National levels, and that is the requirement for all CSEA Enrolled Agent members to also be members of NAEA.

At the January CSEA Board meeting, the Board and those in attendance discussed those two issues. The Board came to a consensus opinion (not a vote) that having NAEA collect our dues and hold them for up to 30 days was a severe hardship to our organization, as our financial situation is still precarious, particularly in the months of November-January. As it is, we have had to access our line of credit to cover necessary operations such as payroll during those lean months. CSEA EVP Leslie Cain and I spoke with NAEA EVP Bob Kerr regarding this hardship, and NAEA is taking a second look at this section of the agreement, though they have stated that they feel they have concealed a great deal already.

Regarding the dual membership requirement for CSEA Enrolled Agents to be members of NAEA, this provision is part of NAEA’s bylaws, so it is not something to be negotiated. Since January of last year, CSEA has had a California Enrolled Agent Associate category (CAEA) that allows new Enrolled Agent members the choice of joining as a full member (CSEA/NAEA), or an associate member (CA only). Signing the agreement will mean that this category will be eliminated, and those new Enrolled Agent members who signed up as associates will have to convert to full membership when their renewal comes due.

At this time, many Board members have indicated that they would sign the agreement if the dues collection issue is resolved, understanding that we could lose most of the CAEA associates to non-renewal.

I am reaching out to you for the following:

1) What do you think of the new agreement?
2) Would you be willing to sign it as it stands now? Please explain your answer.
3) If you feel that there are segments of the agreement that you object to, are there areas within those issues that you could find some compromise? If so, what would they be?

We will be posting the agreement on the website for members to view as well, with the request that they contact you with their feedback, if any. The Agreement is available at [https://www.informz.net/CSEA/data/images/NAEA%20Agreement%20January%202019.pdf](https://www.informz.net/CSEA/data/images/NAEA%20Agreement%20January%202019.pdf).

I respectfully request that you share the opinions of your chapter by the end of April. This allows time for the Directors to consider your information before voting in May at our online meeting.

Thank you so much for your service to our Society.

Warmly,
Cynthia

---

*Please send your comments to Gail@gailstan-taxes.com and I will consolidate them to report to CSEA.*
**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](mailto: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.

---

The City of Dublin, California, goes all out for St. Patrick’s Day, welcoming visitors from all over the world to celebrate with us! Our two-day St. Patrick’s Day Festival at the Dublin Civic Center is one of the biggest on the West Coast, drawing as many as 80,000 people to enjoy Irish entertainment; authentic Irish foods and beverages, as well as popular festival favorites; shopping at 200+ vendors booths; even a pop-up Irish tea cottage. Other events around the City add to the weekend’s festivities. The Dublin Sister City Association hosts the Green & White Gala on Friday night. Alameda County Firefighters Local 55 hosts an annual pancake breakfast on Saturday morning, followed by the Dublin Lions Club Parade. Sunday morning is the annual Shamrock 5K Fun Run and Walk.

Mark your calendar for the 2019 Celebration on Friday - Sunday _March 15-17, 2019_.

Get more information at [http://dublin.ca.gov/293/St-Patrick’s-Day-Celebration](http://dublin.ca.gov/293/St-Patrick’s-Day-Celebration)
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@ssflip.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  ckg111@msn.com
Sassa Oznovicz, EA  kroholm@gmail.com
Aida Torres, EA  AidaAidaTorres.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
Membership Ambassador:
Joanne Anderson, EA  jander3812@aol.com
PLA: 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:
Patty Pringle, EA  patty@eastbaytaxmatters.com
Continuing Education:
Katherine Judd, EA  kjuddea@gmail.com
Education Coordinator:
Marjorie Williams-Jones, EA  Marj@MarTax.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@ebaean.org
Bulletin editor: EBAEA.Editor@gmail.com. (Gail Stan, EA)
Web Page http://www.ebaean.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