



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 2016

NEXT MEETING: **Wed, March 16, 2016**

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!**

5:00 Board Meeting

6:15 Networking (meeting room & bar area)

6:45 Dinner Buffet

7:15 Program: **"Federal Tax Panel"**

Cost: \$40.00 with reservation by Sunday, March 13
\$50.00 with reservation after deadline

Course numbers and credit:

IRS: WZA09-T-01665-16-I

CTEC: 1001-CE-8082

CSEA/NAEA: 1 hour on Federal Tax Law Topics

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: **"Federal Tax Panel"**

Speakers:

Karen Brosi, EA, and 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 in advance to Mike Powers. Experience also tells us that early question submission get more "air" time with the panelists.

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 12-13) 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, or email/call him (at 510-366-8836). 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. 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 SuperSeminars, and for Western CPE, and writes for major tax publications.

Joe Calderaro is an enrolled agent contracted with the California Society of Enrolled Agents as a tax resource specialist. His primary responsibility is to provide technical and procedural support to members of the Society. Joe retired from IRS with over 42 years of service. He spent 35 years providing technical advice to IRS personnel in the Examination and Collection areas and as a liaison to the practitioner community.

With 1 hours 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, EBAAEA

Our February Dinner Meeting was very informative with guest panelists, Lila Fedler, EA, from the FTB Taxpayer Advocate's Office and Karen Brosi, EA. There were a lot of questions about the new FTB website and POA's. A special thanks to Phil Fiegler, EA (for lining up these great speakers) and Mike Powers, EA (for compiling all the pre-submitted questions and transcribing answers).

The March Dinner Meeting should be just as enjoyable with Karen Brosi, EA and Joe Calderaro, EA. If you have a burning question that you want to have answered be sure to submit it early to Mike Powers, EA. Remember we only have one hour for Q & A and you don't want to be left out. Details for submitting questions can be found when you register for the Dinner Meeting, or on the first page of this Bulletin.

Do you specialize in a certain area of taxation? Maybe it's estates, trusts, exchanges, foreclosures or foreign tax. Please be sure to update your CSEA and NAEA information. (Please also note the request from Peggy Hall in the next column, and consider making your specialty known to your colleagues in the Chapter.)

Well here we are in March already and it's crunch time. The days are long, and for many of us, putting in six or seven days a week is not uncommon. One of my favorite things about March is the time change. It stays light later so we can work even more. Be sure to take a break (maybe a short walk) every so often and eat healthy (sometimes that's easier said than done). Remember to laugh a little. According to an article in Psychology Today "laughter reduces pain, increases job performance, connects people emotionally and improves the flow of oxygen to the heart and brain."

Do something nice for someone, people may not remember what you said, but they will remember how you made them feel.

QUICKFINDER ORDER TIME !

by Clare Flores, EA

We are still able to get a group discount, and our chapter gets a commission on each item you buy. Get an excellent reference for the rest of the tax season and support your chapter at the same time. There are multiple handbooks available, including the traditional Form 1040 Quickfinder, and others focused on Small Business, All States, Depreciation, Individual Tax Planning, and Social Security & Medicare. You can order on line at <http://tax.thomsonreuters.com/store>; just be sure to use the discount code Q521. Your order will be shipped directly to you at the price indicated on the form.

A blank, two-page order form is at the back of this Bulletin for your use.

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

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 8:30am
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

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.

SPECIALISTS — AND A PURPOSEFUL LIFE

by Peggy Hall, EA

If you have a specialty, and would be willing to answer questions for other preparers let us know.

Please send your info and specialty to halloftaxes@gmail.com, or the chapter office. Let us know if we can post your info on our website. This will get you a LOT of good karma!

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EBAAEA 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 subscribe, visit:

<https://secure.clientwhys.com/?cid=4942east&subscribe=1>

CHECK YOUR CREDITS!

by Marjorie Williams-Jones, EA

Now that 2015 is past, check the credits posted to your PTIN at the IRS website to make sure that all of your CE for the year has been properly posted.

The link is:

<https://rpr.irs.gov/datamart/mainMenuUSIRS.do>

You can also find this page through IRS.gov / For Tax Pros / Register or Renew your PTIN.

If you can't locate your login information, there's a "forgot password /forgot User ID" wizard to help. Do **not** "Create a New PTIN Account". That will create a new PTIN, which you don't want to do.

After logging in, at the very bottom of the window choose "View My Continuing Education Credits." Selecting that link will open a screen which displays the total credits reported for you for 2013, 2014 and 2015. Clicking the "expand" link will display the detail of the credits reported for you.

Remember that there wasn't any IRS credit for the amazingly fun and informative California tax panel.

After you check your credits, please let me know if you find anything amiss for EBAEA meetings you've attended. You can reach me at: marj@marjtax.com

MEMBERS SPEAK

Upcoming presentations by EBAEA Members include:

March 9 (Wed.): Federal & State Basic Payroll Taxes, 9:00 am – 3:30 pm, 455 Market Street, 6th Floor, San Francisco; contact Andrew Rogers at Andy@TaxBuddha.com for more information

April 20 (Wed): Federal & State Basic Payroll Taxes, 9:00 am - 3:30 pm, 455 Market Street, 6th Floor, San Francisco; contact Andrew Rogers at Andy@TaxBuddha.com for more information

April 27 (Wed): Federal & State Basic Payroll Taxes, 9am - 3:30pm, 1515 Clay St, Room 9, Oakland 94612, contact Mark Bole for more information.

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

CALENDAR OF EVENTS

March 2016

16 EBAEA Dinner "Federal Tax Panel"

April 2016

No EBAEA Dinner Meeting!

May 2016

18 EBAEA Dinner (Topic TBA) and Annual Meeting

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.

HUMOR

Various

"We contend that for a nation to try to tax itself into prosperity is like a man standing in a bucket and trying to lift himself up by the handle."

-- Winston S. Churchill

"The invention of the teenager was a mistake. Once you identify a period in life in which people get to stay out late but don't have to pay taxes – naturally, no one wants to live any other way."

-- Judith Martin

"If you make any money, the government shoves you in a creek once a year with it in your pockets, and all that don't get wet you can keep."

-- Will Rogers

"Rich bachelors should be heavily taxed. It is not fair that some men should be happier than others."

-- Oscar Wilde

"There is no worse tyranny than to force a man to pay for what he does not want merely because you think it would be good for him."

-- Robert A. Heinlein

"Next to being shot at and missed, nothing is quite as satisfying as an income tax refund."

-- F. J. Raymond

"Today, it takes more brains and effort to make out the income tax form than it does to make the income."

-- Alfred E. Neuman

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Website: Patty Pringle, EA 510-912-1682
IRS Practitioner Panel: Phil Fiegler, EA 510-530-1174

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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

Administration Committee (IPP)

Chair: P Gail Nanbu, EA 925-943-3993
Bylaws/SOP: Gail Stan, EA 925-336-0589
Chapter Office: Dagmar Bedard, EA 510-537-3883
Financial Review: vacant
Nominating: Patty Pringle, EA 510-912-1682
Volunteer Coord.: Sharon Hinchman, EA 925-743-1108

EAST BAY ASSOCIATION OF ENROLLED AGENTS

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