



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*

February 2016

NEXT MEETING **Wed, February 17, 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: **“CA Tax Panel”**

Cost: \$40.00 with reservation by Sunday, February 14
\$50.00 with reservation after deadline

Course numbers and credit:

IRS: None

CTEC: To be determined

CSEA/NAEA: 1 hour on State 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.

February Session: “CA Tax Panel”

Speakers:

Karen Brosi, EA, and Lila Fedler, EA

by Robert L. Seymour, EA

This month, we have our annual panel discussion on California tax issues. 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 FTB questions to Mike Power early. If time allows, questions submitted at the dinner will be addressed, but questions that were submitted in advance by email will be considered first.

To submit questions to Mike Power, email him at Mike@PowerInvesting.net. He will confirm receipt of your question(s) within 24 hours, or email/call him (at 510-366-8836) to rattle his cage. If you submit Q's later, there is insufficient time for the panelist's to research your question. Experience also tells us that early question submission get more "air" time with the panelists, so you more likely to get an accurate and robust answer. Since Monday the 15th is an FTB holiday, **our speakers request questions by Friday the 12th, 9 a.m.!**

As in previous years, the questions and answers will be transcribed (by Mike Power — thanks, Mike!) and made available to the Chapter.

With 1 hour of CE on State Tax Law Topics, the target audience is: Enrolled Agents, CPAs, attorneys, CTEC Registered tax preparers, & unenrolled preparers.

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.

Lila Fedler, EA, is currently Technical Assistant to the FTB Taxpayers' Rights Advocate and serves as an FTB spokesperson responsible for education and outreach efforts. Lila began her career with the FTB in 1980, and has a broad range of experience covering both personal income and corporation tax laws. She has experience as a Protest Hearing Officer, Auditor, and as an Audit Technical Specialist and Reviewer. In addition to more than 30 years of experience with FTB, Lila worked in the private sector as a Senior Manager of state and local tax practice. Lila works directly with the Taxpayer Rights' Advocate to assure that the taxpayers have been afforded the protection of the Taxpayer Bill of Rights.

PRESIDENT'S MESSAGE

by *Patty Pringle, EA, President, EBAAEA*

Alert! Be sure to keep an eye out in and around the area of the Super Bowl for the plane carrying the aerial banner advertising "Enrolled Agents, America's Tax Experts. www.findanEA.org". The same banner will be on buses throughout the area.

By now many of you are registered and are using the new My FTB Account to access client information. I've found the information to be very useful, but with both success and frustration. During a couple of Chat Sessions with an FTB Representative, my screen froze and no matter how many times I clicked "send," it was not working. My suggestion to you is to print or save the screen often, so you have documentation of the conversation. All in all, it's a great tool. Kudos to the FTB. It will take a while to work out the kinks but will be well worth it.

By now many of you have either seen or heard the ad claiming "It doesn't take a genius to do your taxes". I wonder what genius came up with that. Oh well, we will be there to pick up the pieces when those geniuses start getting notices from you know who!!

The annual seminar that the East Bay is famous for, "Tax Talk 2016," is in the planning stages. Please send us your ideas for topics that you would like to have covered. We are also planning a mini seminar, "How to complete a return for a 1031 Exchange," a pencil to paper seminar. This will be an intensive class, designed to teach the process from A to Z and get it on the return. It will also increase your bottom line. Please email epatpringle@sbcglobal.net with your ideas.

Remember you don't have to go it alone! One of the best advantages of being a member of the East Bay Chapter is networking. If you have a tax question or just want to run something by another EA, remember that you can reach out to one of your fellow members for help, or go to one of the breakfast meetings listed in this Bulletin (over there, in the next column!). We're all in this together!

TAX HELP DAY – February 6, 2016

by *Peggy Hall, EA*

The East Bay Association of Enrolled Agents will sponsor a Tax Help Day event, along with most of the other CSEA Chapters around California, on Saturday, February 6. This is an event to help the community and to give Enrolled Agents visibility. We will not charge for answering questions from the general public, and will provide no written advice, no return preparation, only answers to questions.

If you come out and volunteer, your Karma will help your team succeed in the Superbowl!

Tax Help Day was started by our own Andy Rodgers and Lonnie Gary. Let's keep the tradition going successfully!

See the flyer at the end of this Bulletin, and send an Email to halloftaxes@gmail.com with your hours of participation.

Oh, by the way, THERE WILL BE DONUTS!

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 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 2nd 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.

CSEA REPORT – BOARD MEETING

by *Aida Q. Torres, EA, 1st Vice President, Education*

This is a report on the January 2016 CSEA Board of Director's Meeting, in Old Sacramento on January 9 and 10, which Patty Pringle, EA and I attended. (My first time in this area of Sacramento!)

The first day agenda involved meetings of the different committees:

First was an Executive Committee discussion covering reports, strategy, and an overview of what the Board of Directors Meeting would consider on the second day.

Second, the PIA (Public Information & Awareness) Committee discussed strategic plan objectives, marketing activity, Tax Help Day (see the flyer with this Bulletin and Peggy Hall's summary), Super Bowl 2016 advertising (see the President's Message in this Bulletin for more), and updates on Legislative Affairs, Education, Membership, and the VITA (IRS) Program.

Third, the Education Committee also had a lengthy discussion, covering our Strategic Plan, Subcommittee Reports on speaker's bureau, partnership outreach, and speaker development (discussed in January's EBAA Bulletin Report)! The focus now is on new business – the 2016 Super Seminar (May 17-19 in Las Vegas and June 1-3 in Reno)! Every member should have received their "Supers" flyer! The Committee also discussed Chapter Promotion of CSEA education events (CSEA Educating America) and the DigiTax series and Pen-to-Paper Event.

Fourth, the Membership Committee conflicted with Education Committee, so I couldn't attend, but the CSEA EVP reported that 302 members have already registered for the Super Seminars! CSEA Members have the \$549 Super Saver Rate until February 29.

Finally, the Finance & Budget Committee Meeting included discussion of funding of Board designated reserve funds, new budget requests, financial statements and variances. These were discussed on the second day as well.

The Board of Directors Meeting took all of the second day. I will focus on membership dues issues that were discussed!

Issue no. 1: A proposed Initiation Fee for new members (\$18) did not pass the BOD, as it serves no important purpose and might be a barrier to membership.

Issue No. 2: It was proposed to eliminate the current dues-sharing practices covering Professional Associates, Renewing and New Professional Affiliates, which in total redirect about \$10,000 to the Chapters annually. This proposal was referred to the Membership Committee for further review and to report on 7-10-2016.

Issue No. 3: The Finance and Budget Committee recommended setting membership dues, as of July 1, 2016, at \$205 for Regular EA Members, \$45 for Members Emeritus, \$45 for Student Members, \$120 for International Enrolled Affiliates, and \$205 for all other mem-

bership categories. There was a motion to lower the renewing member to \$195 rather than \$205 for Regular and "all other" categories, and this was referred to the Membership & Development Committee to work with the Finance and Budget Committee; any changes will be effective 7-1-2016, with no impact on the current fiscal year.

Despite the content-heavy agenda, the meeting adjourned on time!

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!

"NETWORK" WITH YOUR COLLEAGUES

by *Robert L. Seymour, EA*

When you arrive a while before dinner time at monthly meetings, take advantage of the chance to chat with your peers in EBAAEA, both in the meeting room and around the bar area. Help the others who are there by wearing your name badge (official or handwritten!). I'd personally recommend wandering around and mingling, after you stake out a chair for dinner. This about as easy and enjoyable as "networking" gets, and we include it in the schedule for your benefit!

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 won't be 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 EBAAEA meetings you've attended. You can reach me at: marj@marjtax.com

MEMBERS SPEAK

Upcoming presentations by EBAEA Members include:

February 10 (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.

February 17 (Wed.): Schedule C, 6:00 – 8:30 pm, 455 Market Street, 6th Floor, San Francisco; contact Andrew Rogers at Andy@TaxBuddha.com for more information.

February 24 (Wed.): Federal & State Basic Payroll Taxes, 9:00 am – 3:30 pm, 1515 Clay St, Room 9, Oakland, Michele Zimmerman.

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.

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

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 subscribe, visit:

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

FTB ONLINE ACCESS FOR TAX PROS

by Peggy Hall, EA

I am sure you all know by now that the FTB has a new online Practitioner program. We will have access to a lot more on behalf of our clients.

I was thinking it would all be quite seamless. However, when listening to a Spidell webinar on the system, I see there is going to be stuff we need to do in order to get access to this.

To begin with, we have to ask for a password to be mailed to us. That will arrive within 10 days.

The services we will have available will differ, based on whether we are the tax preparer or the representative (having a POA).

We will gain access to our clients account in a few different ways, either uploading a power of attorney or having the client sign in and give authorization.

For married couples there will be a separate account for each spouse.

The new system will make our contact with the FTB a lot easier. More will be done online, but staffing of the Practitioner Hotline will continue as it has in the past.

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

“It is fitting that April 14 is National Pecan Day, because today, we recognize nuts. And tomorrow, on April 15, we pay our taxes to support them.”

-- Craig Ferguson

“If you think it is expensive to hire a professional to do the job, wait until you hire an amateur.”

-- Red Adair

[on filing tax returns] “This is too difficult for a mathematician. It takes a philosopher.”

-- Albert Einstein

“Be wary of strong drink. It can make you shoot at tax collectors... and miss.”

-- Robert A. Heinlein

CALENDAR OF EVENTS

February 2016

- 6 Tax Help Day (see flyer)
17 EBAEA Dinner “CA Tax Panel”

March 2016

- 16 EBAEA Dinner “Federal Tax Panel”

2015 - 2016 Board of Directors and Committee Chairs

President: Patty Pringle, EA 510-912-1682
1st VP: Aida Torres, EA 510-724-6409
2nd VP: Sharon Hinchman, EA 925-743-1108
Treasurer: Carolyn Krieg, EA
Secretary: P Gail Nanbu, EA 925-943-3993

Director 2015 – 2017 (2 year):
Mary M. Geong, CPA, EA 510-654-4417
Gail Stan, EA 925-336-0589
Joanne Anderson, EA 925-938-9086
Director 2015 – 2016 (1 year):
Katherine Judd, EA 925-283-0130
Tim Hintzoglou, EA 925-930-7737
Peggy Hall, EA 510-388-1040
CSEA Director: Aida Torres, EA 510-724-6409

Communication Committee (2nd VP)
Chair: Sharon Hinchman, EA 925-743-1108
Bulletin: Robert Seymour, EA 925-212-8062
Disaster Services: Jan Bridges, EA 510-505-0818
Legislative: vacant
Membership: Sharon Hinchman, EA 925-743-1108
Membership Ambassador:
Joanne Anderson, EA 925-938-9086

Practice Preservation: Linda Fox, EA 925-846-5913
PIA: Patty Pringle, EA 510-912-1682
Quickfinders: Clare Flores, EA 510-785-8356
Website: Patty Pringle, EA 510-912-1682
IRS Practitioner Panel: Phil Fiegler, EA 510-530-1174

Education Committee (1st VP)
Chair: Aida Torres, EA 510-724-6409
Continuing Ed: Katherine Judd, EA 925-283-0130
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

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

Bulletin editor: EBAEA.Editor@gmail.com. (Robert L Seymour, EA)

Web Page <http://www.ebaea.org>

TAX HELP DAY

TAX QUESTIONS? WE'VE GOT ANSWERS!

Saturday, February 6, 2016 - 10 AM - 2 PM

Goodwill Industries, 1301 30th Ave., Oakland, CA 94601

1-925-388-1040 or info@ebaea.org

**Get your tax questions
answered for free by
Enrolled Agents,
America's Tax Experts!**



Topics covered include:

- Affordable Care Act
- Business Deductions
- Buying a Home
- Retirement Planning
- Rental Properties
- Tax Credits
- And more!

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- Correct shipping & sales tax must be included to process your order.
- Include credit card information.
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3 EASY WAYS TO ORDER

- ▶ Visit tax.thomsonreuters.com/store
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	LIST PRICE			ORDER QUANTITY				TOTAL PRODUCT ORDER \$				
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Premium Quickfinder Handbook	\$71	\$67	\$74					\$	\$	\$	\$	<input type="checkbox"/> eBook Only
All States Quickfinder Handbook	\$80	\$76	N/A			N/A		\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
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Laminated Tax Tables for Business Returns	\$16	\$12	N/A			N/A		\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
TAX PLANNING TOOLS												
Tax Planning for Individuals Quickfinder Handbook	\$49	\$45	N/A			N/A	N/A	\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Social Security and Medicare Quickfinder Handbook	\$49	\$45	N/A			N/A	N/A	\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
IRA and Retirement Plan Quickfinder Handbook	\$49	\$45	N/A			N/A	N/A	\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Quickfinder Tax Tips Newsletter**	\$65	\$60	N/A			N/A	N/A	\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
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5	Calculate Quickfinder Order Total — Add amounts from steps 2, 3 & 4	\$ =
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Quickfinder Tax and Financial Tools+	N/A	\$230	N/A		N/A		
RIA Federal Tax Handbook, 2016 Edition	\$98.25	N/A		N/A		N/A	\$
RIA California Handbook, 2016 Edition	\$95.45	N/A		N/A		N/A	\$
OTHER PRODUCTS ORDER TOTAL							\$

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Note: There is no shipping and handling cost for Checkpoint IRS Response Library and Quickfinder Tax & Financial Tools.

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2	Enter your total from this section	\$ =
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5	Sales Tax (apply your rate)	\$ =
6	Grand Total	\$ =

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* Savings of 25% valid on new orders placed by April 15, 2016. Savings promotion excludes Quickfinder Tax and Financial Tools, PPC, RIA, Checkpoint and CPE and may not be combined with any other offers.