February 2017

NEXT MEETING: Wed, Feb. 15, 2017
Place: Dublin Holiday Inn
6680 Regional St., Dublin, CA 94568
(goto 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: “CA Tax Panel”

Cost: $40.00 with reservation by Monday, Feb. 13
$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.

February Session: CA Tax Panel
Speakers: Karen Brosi, EA and Susan Maples (FTB Taxpayer Advocate)

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.

Remember to submit a question, please email Mike (mpower@powerinvesting.net) by Friday to ensure the panel gets to your questions. It is also a courtesy to allow the panel members time to research your question. But if you do have a late question, please still email it, and Mike will bring those to the meeting. Emailing the questions saves time for us, even it is submitted after Friday! When questions are received, Mike will email you back that it was read. No confirming email, then maybe it was not received.

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.

Susan Maples is the Taxpayers’ Rights Advocate with the Franchise Tax Board (FTB). She has been with the FTB for 20+ years working in both Sacramento and the Southern California field offices. She started as an auditor and has experience with personal income tax and corporate tax law. Susan also has experience as a public affairs spokesperson and presenter with the education and outreach program.

PRESIDENT’S MESSAGE
by Aida Q. Torres, EA, NTPI Fellow

“Super Bowl”, this month! Did everyone enjoy the game between these two team, “Patriots” and “Falcons”? I didn’t since I am for the “Forty Niners Team”! Go Niners, this would make the difference for me!
This is the season . . .

“The Shred Fest”, “The Tax Help Day” and the beginning of our season…. Tax Time for us! All I can say is the Shredfest helped us get our offices ready for this busy season. The “Tax Help Day” was a good start for extending our help to clarify tax questions in our community! Also, this gave the Enrolled Agent designation exposure to the public, per se, to our community!

I would like to thank our EA members who volunteered for the Tax Help Day on February 4th, from 10:00 am to 3:00 pm: Marc Bole, EA and Norberto Raposas, EA in the morning; Sharon Hinchman, EA and Dan Leong, CTEC (a well-motivated and upcoming new EA member) in the afternoon and myself for the whole time! Hooray! We had nine (9) individuals show up!

Most questions were raised on individual issues such as a divorce case, medical issues, do I have to file issue, past taxes due issue and Uber and Airbnb businesses! I was able to get a prospective client! It was really unexpected for these folks to show up because it was pouring rain the whole time! But our efforts paid off for “Tax Help Day”, rain or shine, people show up! See the photos later in this Bulletin. On Facebook, I have shared the Tax Help Day Ad, so the fifteen (15) Chapters out of the 19 total CSEA Chapters that do not have a Tax Help Day may get inspired.

I don’t have much more to share and up-date! But for all of us to have a

“GREAT TAX SEASON FOR 2017!”

CSEA BOARD REPORT
by Sharon Hinchman, EA, NTPI Fellow

Have you gone into the CSEA website lately? Check out the upgrades. The new CRM is in place and you may wish to check out your member profile and update it. More features will be rolled out soon.

As a continuation of last month’s report on the January board meeting, my committee reports are as follows:

Legislative

A number of new bills have been brought to the floor of the legislature. None are far enough along to be of concern. The usual bill to impose sales tax on services is again open for discussion but so far has little chance.

Budget and Finance

Our meeting took place before the announcement of the new EV. The budget forecast will need to be revised before the annual meeting in June for the start of the next fiscal year. Much of the deficit will be gone when in the coming year, there are not 2 annual meetings in the same cycle and the New EVP has an opportunity to rework the existing budget.

Bylaws

I reported that East Bay had revised and voted on the corrections to the Bylaws. Hats off to East Bay. We were the first one in with the updates. Both East Bay and CSEA bylaws are available on the CSEA website.

Scholarship Committee

Scholarship applications were submitted and scholarships were awarded. The next round of scholarships will be due sometime prior to the annual meeting in June. Scholarships are available for several purposes including SEE Card classes and NTPI. Please take advantage of this benefit.

SHREDFEST
by Patty Pringle, EA

On January 21st The East Bay Association of Enrolled Agents held Shredfest 2017. Thank you to the volunteers for coming out that day. Gail Stan, EA provided an amazing canopy just in case it rained. Many of the attendee’s commented that they hope we will make this an annual event. Thanks also to these volunteers for making it happen: Dagmar Bedard, EA, Sharon Hinchman, EA, Monte Lee, EA (Monte even posed for a picture).

Editor’s Note: And a big THANK YOU to Patty Pringle for organizing this event and working out all the details for the Permit from the City of Dublin and with the Holiday Inn.

EBAEA MEMBERSHIP
by Gail Stan, EA

To help you get to know our members, we are running profiles of some of our members in each issue of the Bulletin. Each future issue will have a profile of at least one Officer or member of the Board of Directors and one or two general members. If you are interested in being profiled, see the template later in this Bulletin – fill it out and return it to the editor at EBAEA.Editor@gmail.com. You can send a photo of yourself if you would like to have it included with your profile - it will help the members know who you are!
If you have never received an EBAEA Membership Certificate, please send an email to Gail@gailstan-taxes.com and I will get one for you.

OFFICER/BOARD OF DIRECTORS

Name: Ralph Nelson, EA
Current EBAEA Officer Position: Director
Year became EA: 2002
Year became NTPI Fellow: 2016
Location of practice: El Cerrito, CA
# of Employees: Just me
Education: AA in accounting
Tax Specialization(s): Resolution work
How/Why became EA: To be able to use the designation
What do you like best about being an EA: Clients like the designation and are sometimes more willing to hire me because of it.
What do you like least about being an EA: The general public does not know about us.
Former officer of EBAEA – Position(s) & year(s): Director around 2005
Anything else: I love to do resolution work because my clients are deeply appreciative of the work that I do.

IRS Stakeholder Liaison Meeting
by Patty Pringle, EA

On January 25th I attended the IRS Stakeholder Liaison Meeting in San Jose. Our chapter IRS Stakeholder Liaison is Terri Malone, Senior Stakeholder Liaison and Jennifer Henrie-Brown, Stakeholder Liaison Specialist/Communications Stakeholder Outreach. This event was sponsored by The Mission Society of Enrolled Agents. Derek Ganter, IRS Stakeholder Liaison Manager for the Western Area Field including CA, NV and Hawaii presented via Skype

The IRS is reorganizing the SBSE for the Stakeholder Liaisons and expanding their roles. The transition should take place in approximately 60-90 days. The Stakeholder Liaison’s will now provide not only outreach for Small Business Self Employed (SBSE) but will include outreach for all individuals and all entities. This is a huge change.

Terri and Jennifer also want tax professionals to know that communication with them is a two-way street. We want to hear from them and they want to hear from us. They are urging us to contact them first if we have a data breach or if we even suspect that we have had a data breach. Better safe than sorry. Some useful IRS Publications include 4524 and 4535. You can also check out the latest scams & alerts from the IRS go to irs.gov type latest scams & alerts to keep up to date with what the crooks are up to. “Protect your clients – Protect yourself”.

NAEA 2016 AWARD WINNER
by Gail Stan, EA

Our very own Lonnie Gary, EA (Past President of EBAEA) was one of two EAs awarded the Founders Award by NAEA for 2016! The Founders Award is the Association’s highest recognition bestowed on a member. It recognizes “significant leadership and contributions having immediate or long-term impact on the growth and progress of the Association.”

The January/February 2017 issue of the EA Journal gave the following writeup. Lonnie Gary, EA, has served the organization for many years in many capacities. He’s been a driving force on the Government Relations Committee and is one of the few members who have served as both president of CSEA and NAEA. A nomination stated correctly that, “His steady and calm approach to issues, combined with his strategic views, have been great assets for NAEA.”

Congratulations Lonnie!

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

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.

MEMBERS SPEAK

Upcoming presentations by EBAEA Members include:

3/22/17 – Andy Rogers, EA – Basic Payroll 9 am – 3 pm San Francisco, 455 Market Street, 6th Floor

4/19/17 – Michele Zimmerman - Basic Payroll 9 am – 3 pm San Francisco, 455 Market Street, 6th Floor

4/20/17 – Mark Bole, EA - Basic Payroll 9 am – 3 pm Oakland, 1515 Clay Street, Room 9
February 2017

15 EBAEA Dinner - Dublin Holiday Inn
FTB Panel with Karen Brosi, EA and Susan Maples (FTB Taxpayer Advocate)

March 2017

15 EBAEA Dinner - Dublin Holiday Inn
Federal Panel with Karen Brosi, EA and Joe Calderaro, EA

April 2017 – NO MEETING

May 2017

17 EBAEA Dinner - Dublin Holiday Inn
Annual Membership Meeting and Election of Officers and Directors

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

**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. *(Some issues are monthly and some are combined months. January and February will be single issues but March/April will be a combined 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 Affiliates and Professional Associates 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.
2016 - 2017 Board of Directors and Committee Chairs

President: Aida Torres, EA aida@aidatorres.com
1st VP: Sharon Hinchman, EA sharon@alamo-tax.com
2nd VP: Gail Stan, EA gail@gailstantaxes.com
Treasurer: Carolyn Krieg, EA ckieg111@msn.com
Secretary: Peggy Hall, EA halloftaxes@gmail.com
Immediate Past President: Patty Pringle, EAPattypringle@sbcglobal.net

Director 2016 – 2018 (2 year):
- Mary M. Geong, CPA, EA mmgeong@aol.com
- Mirasol Neufeld, EA mira@meneufeld.com

Director 2016 – 2017 (1 year):
- Katherine Judd, EA kjuddea@gmail.com
- Lourdes Rabara, EA lrabara@aol.com
- Ralph Nelson, EA taxhelp@financial-harmony.com

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

Communication Committee (2nd VP)
Chair: Gail Stan, EA gail@gailstantaxes.com
Bulletin: Gail Stan, EA EBAEA.Editor@gmail.com
Disaster Services:
- Jan Bridges, EA janbridges@comcast.net
IRS Practitioner Panel:
- Phil Fiegler, EA pf@philtax.com
Legislative:
- Sharon Hinchman, EA sharon@alamo-tax.com
Membership:
- Gail Stan, EA gail@gailstantaxes.com
Membership Ambassador:
- Joanne Anderson, EA jander3812@aol.com
PLA: Patty Pringle, EAPattypringle@sbcglobal.net
Practice Preservation:
- Linda Fox, EA fox4tax@aol.com

Quickfinders:
- Clare Flores, EA clare@taxandpayroll.com
Website:
- Patty Pringle, EAPattypringle@sbcglobal.net

Education Committee (1st VP)
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, EAPattypringle@sbcglobal.net
Program: Peggy Hall, EA halloftaxes@gmail.com
SEE Class:
- vacant
Tax Talk:
- Patty Pringle, EAPattypringle@sbcglobal.net
Town Hall:
- Patty Pringle, EAPattypringle@sbcglobal.net

Administration Committee (IPP)
Chair: vacant
Bylaws/SOP: Gail Stan, EA gail@gailstantaxes.com
Audio/Visual Technical Advisor
- Dagmar Bedard tax@dagmarbedard.com
Chapter Office Administrator
- Patty Pringle, EAPattypringle@sbcglobal.net
Chapter Office Liaison:
- Dagmar Bedard, EA tax@dagmarbedard.com
Financial Review:
- Gail Stan, EA gail@gailstantaxes.com
Nominating:
- Aida Torres, EA aida@aidatorres.com
Volunteer Coordinator:
- Sharon Hinchman, EA sharon@alamo-tax.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

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
Tax Help Day Photos

Norberto Raposas, EA, Aida A. Torres, EA and Mark Bole, EA with participant.

Norberto Raposas, EA

Sharon Hinchman, EA and Mark Bole, EA with participants.
Issue Management Resolution System
Turning issues into answers

Can we talk? Yes...more than ever. The Issue Management Resolution System helps tax customers communicate their issues directly with the IRS. IMRS provides a gateway for tax professionals and small business leaders to bring forward information about tax policies, practices and procedures that may negatively affect compliance and quality customer service for the American public.

Each month, IMRS issues and answers are listed on www.irs.gov (search: IMRS) for easy reference. The list includes issues of specific interest to the tax professional and small business communities such as:
- Conflicting policies
- Unclear or confusing procedures
- Processing problems

Because IMRS issues are systemic issues, responses are of interest to practitioners and small business leaders across the country.

Got issues? We’re listening. Contact:

Name: Terri Malone
Jennifer Henrie-Brown
Phone: (510) 907-5233; (510) 907-5117
eMail: Terri.Malone@irs.gov
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?