February 2018

**TAX TIME**

Tax Help Day is a FREE Public Service Event sponsored by the California Society of Enrolled Agents (CSEA) and its 19 Chapters. Local Enrolled Agents, “America’s Tax Experts,” will be available to answer your questions on a wide variety of tax topics like the Affordable Care Act, running your own business, buying a home, getting married, and much more.

- **What:** Tax Help Day – East Bay, a free public service sponsored by the California Society of Enrolled Agents (CSEA) and its 19 Chapters
- **When:** February 3rd, 9am to 1pm
- **Where:** Pleasanton Farmers Market, 77 W Angela St., Pleasanton
- **Who:** Contact Gail Stan, Enrolled Agent (EA), (925) 336-0589, gail@gailstantaxes.com
- **Why:** Local Enrolled Agents, “America’s Tax Experts,” will be available to answer your questions on a wide variety of tax topics like casualty losses from recent natural disasters, Tax Reform, the Affordable Care Act, running your own business and much more.
- **Links:** Facebook event: [https://www.facebook.com/events/1439775942815667/](https://www.facebook.com/events/1439775942815667/)

**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.

Please send your panel questions to our scribe, Michael Power, CFP, EA at mpower@powerinvesting.net. Our meetings are on Wednesday, and the panel members will research your question for you! But we must be courteous and give them as much lead time as possible. (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 an 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: 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.

The session will be 2 hours and there is no IRS Continuing Education since it is CA tax info.

**PRESIDENT'S MESSAGE**

*by Sharon Hinchman, EA, NTPI Fellow*

Is everyone ready for this season? I spent most of December answering the definitive question “should I prepay my state or property tax.” After about the tenth one, I really wanted to just say, “it depends.” I maintained my cool and looked them all up and gave them a “nice answer.”

I want to thank everyone who attended our December Mixer. It was great to see some people I hadn’t seen in quite a while. It was a great opportunity to visit and catch up without being rude to a speaker. We also had a couple of icebreaker exercises for which we gave prizes. The ugly sweater contest was a real hoot! See the photos later in the Bulletin.

As we go into 2018, our next two meetings will be our tax panels: California in February and Federal in March. Once again Mike Powers will be collecting your questions for our experts.

We are planning a mini seminar for May that will address the issues of employee stock options. This is an area for which we have received many requests and is more information than can be covered in a normal dinner meeting. We are planning for Wednesday afternoon just ahead of our normal monthly meeting with a different dinner topic. More details as we finalize the May meeting. 5 CE units for both.

As outgoing president, I am also responsible for the nominating committee. We are looking for a few good people to round out our board. We need to fill the Treasurer’s position and both VP positions and possibly a Director position or two. When I was first asked “why aren’t you on the board?” I answered, ‘nobody ever asked.’ I’m asking now. We are always looking for fresh ideas. Many hands make light work.

Since we are only publishing the Bulletin every other month for the next few month, may I wish a prosperous and uneventful tax season.

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**CSEA LEGISLATIVE ACTION FUND**

**EBAEA CHALLENGE**

*By Gail Stan, EA, CSEA Director*

For the last several months, the EBAEA Board has challenged our members to make donations to the CSEA Legislative Action Fund and the Board would match up to $1500 in donations.

I am happy to report that our EBAEA members stepped up and contributed a total of $1,650 (that we know about). Those donations and the Board’s matching $1500 were presented to CSEA at the January 7, 2018 Board Meeting in Sacramento.

**CSEA DIRECTOR’S REPORT**

*By Gail Stan, EA, CSEA Director*

Several items were discussed during the various CSEA Committee meetings which were then proposed to the Board for an official vote.

1. The Member Engagement and Promotion Committee (MEPC) which is the new Committee formed by merging Membership and PIA, proposed a new membership category – CA EA Associate Member. After much discussion during the Board meeting, this motion was amended and approved. This new category is for California resident EAs who want to be members of CSEA but not members of NAEA. To qualify for this category, the EA cannot have been a member of CSEA for the past 3 years, they do not have voting privileges and cannot serve as an officer or director at the Chapter or CSEA levels. The dues will be the same as the regular members at $195/year.

2. Dues for the 2018-2019 membership year will remain at $195/year.

3. Given the current climate on harassment in general, it is prudent to ensure that CSEA’s leaders have a
clear understanding of what behaviors are consid-
ered offensive and unacceptable. In an ideal world, members and leaders would relate to each other purely as professional colleagues, without bias based on gender, race, religion, or any of the myriad prejudices we all contend with. In reality, the Society is made up of people from a range of generations and backgrounds, with varying opinions about what constitutes acceptable behavior.

A motion was presented by the Executive Committee to have a formal Anti-Harassment Policy and that the Bylaws be changed to reference this Policy. This was approved by the Board.

Thank you to Linda Fox for volunteering to be the EBAEA Representative on the CSEA Legislative Committee.

The Nominating Committee is in the process of contacting people to see if they would be interested in serving on the Board for the 2018-2019 year. Please contact President Sharon Hinchman, EA or 1ST VP Gail Stan, EA if you have questions or would like to volunteer for a position. We need volunteers for the following positions:

- **1st Vice President** – is also the designated CSEA Director.
- **2nd Vice President** – Patty Pringle, EA stepped up to fill this position temporarily but as a two-time Past President, she really does not want to continue up the chairs again. So, we need someone to volunteer to be 2nd VP with the intention of moving up to 1st VP and then President.
- **Treasurer** – Carolyn Krieg, EA has served for 3 years and according to our Bylaws, that is as long as she can serve.
- **Directors**

   The Nominations will be announced in the May Bulletin and the voting for new officers will be at the May Annual Meeting. Nominations will also be accepted from the floor.

**MEMBER PROFILE**

Name: Surekha A. Vaidya  
Year became EA: 1996  
Location of practice: Walnut Creek, CA  
Education: MBA Finance, Accounting  
How/Why became EA: To increase my knowledge & expertise in tax laws & practice  
What do you like best about being an EA: Recognition, knowledge, ability to help clients in representation  
What do you like least about being an EA: Meeting unpleasant agents/clients not ethical  
Anything else: Member Board of Directors CA chapter of NATP, Retired member Board of Directors NJ chapter of NATP, NATP certified chapter instructor

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**Small Group Tax Meetings**

**Antioch/Brentwood**  
Fridays 8:00am  
Brentwood Cafè, 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

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**FOR SALE!**


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Peggy Hall EA  
(925) 388-1040
**February 2018**

3  Tax Help Day – Pleasanton Farmer’s Market – 9 AM TO 1 PM

21  EBAEA Dinner - Dublin Holiday Inn
    **Topic** – CA Tax Panel with Karen Brosi, EA and Susan Maples

**March 2018**

21  EBAEA Dinner - Dublin Holiday Inn
    **Topic** – Federal Tax Panel with Karen Brosi, EA, Sharon Kreider, EA, CPA and Joe Calderaro, EA

**April 2018**

No Meeting – Everyone is too Busy!

**May 2018**

16  Mini Seminar – Dublin Holiday Inn
    **Topic** – Employee Stock Options
    This will be 4 hours of CE before the dinner meeting

16  EBAEA Dinner - Dublin Holiday Inn

**June 2018**

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

27-29  CSEA Super Seminar – Reno, NV

**November 2018**

7-9  EBAEA Tax Talk Seminar – Dublin Holiday Inn

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**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. *(There will be no April issue of the Bulletin; we will resume publication for May 2018.)*

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.

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**Paid Advertisement**

OIC Settlement: $385,812 settled for $11,844. Call with questions about OIC’s for your clients.

Ralph Nelson, EA
510-828-6215
2017 - 2018 Board of Directors and Committee Chairs

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

1st VP: Gail Stan, EA  
gail@gailstantaxes.com

2nd VP:
Patty Pringle, EA  
patty@eastbaytaxmatters.com

Treasurer: Carolyn Krieg, EA  
ckrieg111@msn.com

Secretary: Katherine Judd, EA  
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Immediate Past President:
Aida Torres, EA  
da@aidatorres.com

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PIA: Patty Pringle, EA  
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Practice Preservation:
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Quickfinders:
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Website:
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patty@eastbaytaxmatters.com

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Chair: Sharon Hinchman, EA  
sharon@alamo-tax.com
Continuing Education:
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Education Coordinator:
Marjorie Williams-Jones, EA  
Marj@MarjTax.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
Dagmar Bedard  
tax@dagmarbedard.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:
Aida Torres, EA  
da@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
Below is the "Ice Breaker" we used to start the Mixer. You had to talk to different people and get them to sign on your sheet for an item that they had done and they could only sign one item per sheet. There are 22 items and 3 people found someone to sign for 21 of them – no one got all 22! From those 3, we drew a completed form and awarded a bottle of wine.

Can you guess which one of these items no one in the room had done?

- Have you ever been to Europe?
- Have you ever ridden on a motorcycle?
- Have you ever lived in another state?
- Have you ever met a celebrity?
- Have you ever been to Disney World?
- Have you ever planted a vegetable garden?
- Have you ever been a car salesperson?
- Have you ever planned a wedding?
- Have you ever ridden in a limousine?
- Have you ever driven a riding lawn mower?
- Have you ever participated in a marathon?
- Have you ever gone mountain climbing?
- Have you ever been to a chiropractor?
- Have you ever been a member of a sorority or fraternity?
- Have you ever participated in a beauty contest?
- Have you ever had a dog compete in a dog show?
- Have you ever been somewhere while an earthquake occurred?
- Have you ever been somewhere while a tornado took place?
- Have you ever been somewhere while a hurricane occurred?
- Have you ever been on a college sports team?
- Do you speak a second language?
- Have you ever played an instrument?
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?