
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!)

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

Cost: $40.00 with reservation by Monday, Mar. 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.

March Session: “Federal Tax Panel”
Panelists: 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.

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 Friday prior to the session (Mar 10) 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 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 authority in the Wall Street Journal, Money Magazine, Forbes, The New York Times and a variety of local radio, television and print outlets.

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 Aida Q. Torres, EA, NTPI Fellow

It was such a good evening for all us during the last dinner meeting, having our CA Tax Panel Speakers; Karen Brosi, EA and Susan Maples, CPA (FTB Taxpayer Advocate) answering all our questions and hopefully, some tax issues that need to be updated with FTB in the near future!

The March 15th meeting is our Federal Tax Panel with Speakers: Karen Brosi, EA and Sharon Kreider, EA. Prepare and email all your tax questions in advance to Mike Power, EA at Mike@PowerInvesting.net to allow time for research. This month’s dinner meeting should be just as enjoyable as the last month’s meeting.

We look forward to getting answers for all our tax issues, especially during this busy tax time. The clarification and how to approach reporting to IRS and FTB is of great benefit to our tax clients!

All EA’s have a certain area of specialization in taxation! As for myself, my cup of tea is in the area of Like Kind Exchanges or 1031 Exchanges. Since I am also a licensed California Realtor, I enjoy anything connected to Real Estate! Is anyone a specialist in other areas such as estates, trusts, foreign tax, corporations or partnerships? I know that Sal Romo, EA specializes in Estates and Trusts; and based on his 20 years of experience, I have used his services in this area. Let us know your specialization by filling out the Member Profile form at the end of this Bulletin and sending it to Gail Stan, EA our Bulletin Editor at EBAEA.Editor@gmail.com, and she will publish your profile in our bulletin. We cannot get your information out to our members if you do not provide it to us by submitting a profile form.

I am hoping that most of our EA members have registered for one of the “Super Seminars” in either in Reno or Las Vegas and received their discount by registering before February 28. I did since the next CSEA board meeting will be in Reno! It was a very good discount to take advantage of for early registration! There are still discounts available but don’t wait till the last minute! See you all in either Las Vegas or Reno!

WHAT FLOATS YOUR BOAT?
by Sharon Hinchman, EA, NTPI Fellow

I was happy to see so many of you at the February dinner meeting. Our usual monthly turnout was increased by 50%! Let’s see if we can fill the room behind s as well.

Karen Brosi and Susan Maples gave us great advice and insight about the FTB and what is to come, as well as answering current pressing questions. I know the Sharon and Karen show will do the same for March as we get into federal issues and trends for the filing season.

I would love to see all of you there every month. The same participation in chapter activities all year round would be great. What can we do to make that happen? I’m open for suggestion. My email is listed.

Do you have topics of interest to you that we are not addressing? Let Peggy Hall know, she has done a yeoman’s job of getting speakers on any and all topics suggested.

I know with the inevitable tax changes coming down from Washington, I expect to see a renewed interest and more of your faces in the future. While we can get our continuing education on line, we are isolated and don’t have anyone to bounce off questions or ideas. Human contact is not a bad thing!

An organization is only as strong as its members. I cannot list all of the help and input I have received from my fellow EA’s over the years. We give and take from one another. Sometimes we learn more from our table mates than we do from the speaker.

ELECTION OF OFFICERS AND DIRECTORS
by Gail Stan, EA

Some of you may not be aware that EBAEA is one of only three chapters of CSEA that is Incorporated. The May 17th meeting will be EBAEA’s Annual Meeting and we will hold the election of Officers and Directors for the 2017-2018 term.

As with any organization, we need people to volunteer to fill a variety of positions that help our organization run and fulfill our mission. Look at the volunteers in the 2016 - 2017 Board of Directors and Committee Chairs list later in this Bulletin. These are the people who keep our organization running.

If you have any interest in volunteering for a position, please contact President Aida Torres, 1st Vice President Sharon Hinchman or any of the other members of the Board of Directors.

Watch for an email from the East Bay Association in April for the slate of candidates for the election.
MEMBER PROFILES

Name: Duncan Sandiland, EA  
Year became EA: 1996  
Year became NTPI Fellow: 1998  
Location of practice: The Woodlands (suburb of Houston), Texas (moved in 2013, still make occasional visits to the Bay Area where most of my clients reside)  
# of Employees: no office staff  
Education: BS in Accounting and Marketing, MS in Financial Services  
Credentials: EA, CFP, CLU, ChFC, NTPI, CSTAR2, and at least a dozen others dealing with the full spectrum of personal finance, multigenerational wealth management and small business matters  
Tax Specialization(s): estates/trusts, making weird concepts understandable  
How/Why became EA: My college buddy was an attorney starting up an estate planning practice. He told me he couldn’t refer 706 work to me unless I had some initials – either CPA or EA. I didn’t like the CPA model but I didn’t know what a 706 or an EA was. After I found out, they both looked interesting. I bought a review course, passed the exam, went to my first EBAEA meeting, met Sal Romo, EA and Dolores Greer, realized I had found my professional home, and never left...  
What do you like best about being an EA: Solving unusual problems and then teaching clients how to improve their financial lives  
What do you like least about being an EA: Constantly trying to explain to clients all the unrealistic and often idiotic things our elected (and unelected) officials do to tax policy.  
Former officer of EBAEA – Position(s) & year(s): From memory: Director 1997-98, Treasurer 1998-2001, 2VP 2001-04, 1VP 2004-05, President 2005-06, IPP2006-07; also, Bulletin Editor 2005-14, and Membership Chair for a few years early on  
Former officer of CSEA/NAAEA - Position(s) & year(s): Director 2004-05  
Anything else: "It wasn’t my fault. It was like that when I got here. And anyway, Mike Power told me to do it that way." On a serious note, the entire Texas EA society has fewer members than just East Bay Chapter on its own. EBAEA and CSEA are

PHENOMENAL resources that most of us (myself included) take for granted. Go to Chapter meetings and CSEA functions. Meet new people. Share ideas. Oh, how I miss that!

Name: Daniel W. Leonard, EA (Dan)  
Year became EA: 2016  
Year became NTPI Fellow: Taking Level 1  
Location of practice: San Ramon, CA  
# of Employees: Me & P/T Assistant  
Education: BA Management, Moravian College, Bethlehem, PA  
Tax Specialization(s): General Practice – mostly individuals  
How/Why became EA: I have been in the investment business for 27 years. I am a CFP and got tired of knowing the answer, but not being able to help my clients. I decided to take the steps to get my EA.  
What do you like best about being an EA: Being able to offer both investment and tax advice to my clients. It has been great learning about tax preparation and meeting so many fellow EAs. Everyone has been very helpful.  
What do you like least about being an EA: This is my second season so I am still mastering the learning curve.  
Anything else: I am taking it slow bringing on new clients, but I have the ability to do more than I am. Tax Preparation isn’t my main business. I am always open to helping out other preparers if you need help.

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  
5/17/17 – Michele Zimmerman - Basic Payroll 9 am – 3 pm San Francisco, 455 Market Street, 6th Floor
April 2017 – NO MEETING

May 2017
17  EBAEA Dinner - Dublin Holiday Inn
   Annual Membership Meeting and
   Election of Officers and Directors

June 2017
21  EBAEA Dinner - Dublin Holiday Inn

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, February and March will be single issues but April/May 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.

As of Wednesday, March 8, only 41 more days to April 18!
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 ckrieg111@msn.com
Secretary: Peggy Hall, EA halloftaxes@gmail.com
Immediate Past President: Patty Pringle, EA patty@eastbaytaxmatters.com

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 jan_bridges@comcast.net
IRS Practitioner Panel:
Phil Fiegler, EA pf@philtax.com
Legislative:
Sharon Hinchman, EA sharon@alamo-tax.com
Membership:
Gail Stan, EA, EA gail@gailstantaxes.com
Membership Ambassador:
Joanne Anderson, EA jander3812@aol.com
PIA: Patty Pringle, EA patty@eastbaytaxmatters.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 (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, 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 (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, 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 aida@aidatorres.com
Volunteer Coordinator:
Sharon Hinchman, EA sharon@alamo-tax.com

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
Our guest panelists Susan Maples and Karen Brosi, EA with Peggy Hall, EA our Program Chair.

“Sometimes we learn more from our table mates than we do from the speaker.”
   Sharon Hinchman, EA

Lots of Networking during dinner.

What a great turn out! One of the best attended meetings in a long time.
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?