NEXT MEETING: Wed., May 16, 2018
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: “Social Security”

Cost: $40.00 with reservation by Monday, May 14
$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.

Almost Sold Out!
May 16 - Mini Seminar – Stock Options

Reserve Wednesday, May 16 for a special mini seminar on “Everything you wanted to know about Stock Options.” This will include a pen to paper explanation from grant to sale and everything in between. 4 Hours of Federal CE.

Class is from 1 PM to 5 PM mid-afternoon snacks are included. Space is limited. Early Bird $ 99.00 thru May 1, 2018. May 2, 2018 thru May 15, 2018 $125.00. Day of the seminar $150.00.

This 4-hour mini seminar will be held at the Dublin Holiday Inn during the afternoon before our regularly scheduled dinner meeting.

Our guest presenter will be Santos Solano, EA, Tax Manager at Sensiba San Filippo, LLP; who has technical expertise working with high net worth individuals and closely held businesses. His industry specialties include manufacturing, constructions, technology, and real estate. He graduated from Santa Clara University and has been serving in public practice since 2004. In his free time, he enjoys hiking, and training his Lab.

May Dinner Meeting: Social Security
Speaker: Terry Allen, CFP

Social Security can be more complicated than people realize. Ways to minimize taxes on Social Security benefits. The session will be 1 hour and CE is not determined yet.

Terry is a Certified Financial Planner™ (CFP®), and Accredited Wealth Management AdvisorSM (AWMA®) and earned her professional designations from the College for Financial Planning. Separately, she is a Financial Advisor with Royal Alliance Associates, Inc. Terry is a member of the Financial Planning Association (FPA), Estate Planning Council of the East Bay and is Immediate Past President of the Estate Planning Council of Diablo Valley. She graduated from the University of San Francisco with a Bachelor of Science Degree in Mathematics.

Terry is a sought after thought leader. Her interviewers include Forbes Magazine, the leading source for reliable business news and financial information, The Suit Magazine, a publication that features successful corporate executives and professionals and Rental Housing Magazine, a publication of the East Bay Rental Housing Association.

PRESIDENT'S MESSAGE
by Sharon Hinchman, EA, NTPI Fellow

It’s May 1st and we have officially had a few days off. I noticed a few emails saying that some of you were actually out of the office until May 1 or after. Lucky you!
Now that we have decompressed, it’s time to get back in the CPE groove and learn a new set of rules for 2018.

While you are looking over the classes available, may I draw your attention to East Bay’s mini seminar offered on May 16, at the Holiday Inn in Dublin. We will offer a small setting with pen to paper examples and a great PowerPoint to teach you all you ever wanted to know about stock options but didn’t know what to ask. Seating is limited and is almost full. You may enroll online with 123 Signup. Stick around for dinner and hear Terry Allen tell you about all the ins and outs of the Social Security system. What a valuable double header.

Please remember that May is also election month. Please come a cast your vote and make sure your voice is heard. Many of the functions and changes in our meetings have come from suggestions of the membership. If you want change, step up and be counted.

Take a look at the Super Seminar offered by CSEA. Please note it is only offered on June 27-29 in Reno. Take a break and absorb what you’ve heard and get ready for Tax Talk on October 29-31. Gee folks, I can’t say the November Seminar anymore!

EBAEA ANNUAL MEETING NOTICE
by Aida Torres, EA, Immediate Past President

The Annual Meeting of the East Bay Association of Enrolled Agents (EBAEA) will be held at the May EBAEA Monthly Dinner Meeting on May 16, 2018 at 7:00 pm at the Dublin Holiday Inn.

The EBAEA Nominating Committee has proposed the following slate of candidates for our 2018-2019 fiscal year:

President: Gail Stan, EA
1st VP: Cheryl Meder, EA
2nd VP: Patty Pringle, EA
Treasurer: Lourdes Rabara, EA
Secretary: Katherine Judd, EA
Immediate Past President: Sharon Hinchman, EA
Continuing as Director through 2019
   Peggy Hall, EA
   ?
Directors 2018-2020
   Suzanne Oznowicz
   ?

The EBAEA Bylaws provide that eligible members can run from the floor with no advance notice. However, as a courtesy to those planning the meeting (which is already under a very tight timetable), it is requested that any floor candidate provide advance notice to President Sharon Hinchman, EA or 1st Vice President Gail Stan, EA.

MEMBERSHIP COMMITTEE
Aida Q. Torres, EA, NTPI Fellow
Immediate Past President & Membership Chair

WELCOME ALL NEW EA MEMBER!
I have been out of the loop for almost three months since January 2018! January 3rd, 2018, my beloved sister died of “Cancer,” who had been suffering for nineteen (19) years. Then, in same month, 22nd day, I was appointed as “Finance Commissioner” of the City of Hercules. I was appointed by our “Mayor” who was my client in an “IRS Audit.” And without a doubt, I had to accept to serve our community, time for me to serve!

And now, without further ado and fanfare to all new EA Members, who may be our future BOD (Board of Directors and Officers), we invite them to join us & to bring their profession to the next level, we welcome;

Enrolled Agents (Full Members):
Andreas Bleske, EA
Pascual Garcia, EA
John Gould, EA
Carmen Hester, EA
Daniel Leong, EA
Shyam Shrestha, EA

Professional Associates:
Ann Opara, CPA

CAEA - Associates:
Jeffrey Carlton, EA
Bryce Despain, EA
Clark Despain, EA
Keith Despain, EA
Pamela Elliott, EA
Jocelyn Jarrett, EA
Cristino Neri, EA
Nzinga Nyagua, EA
Victor Santos, EA

Associates:
Anthony Carr
Terence Cullen
Jessica Klenow
Alvin Maglan
Kevin Rego
Amanda Schwenzfeier
Jackie Stevens

Student:
Calisse Tarpley

Footnotes:
• **Full Member** = EAs who are Members of CSEA & NAEA with voting rights
• **CAEA-Associate** = CA resident EAs who are members of CSEA but not 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.
• **Associate** = Professional Associate with CSEA - Non-voting member
• **Student** = Student CSEA Member - Non-voting member

Help us get to know you by sending us your “Professional Profile.” All our EA members will see your level of professionalism, your expertise & “gusto”! This is not just for new EAs but also for all current members who have not done this to-date! Take charge! The “Profile” Form can be found at the end of this bulletin!

Certificates for new EA member can only be given to them during our dinner meeting, since no mailing is done to improve our budget! Those who have not received a certificate, please let me know in advance so I can prepare the certificate and have the Board of Directors sign!

If you have just joined and your name is not listed above, contact Aida, aida@aidatorres.com

All new members and professional associates will receive a packet from CSEA. All new EA members will receive a packet and certificate from EBAEA. If you are a new EA member and haven’t received a packet from the membership committee, please let us know.

Watch for the “Post Card Invitation” as a follow-up to all our new members!

‘SEE YOU ALL AT OUR “DINNER MEETING” & “MINI SEMINAR (STOCK OPTIONS)” ON MAY 16TH’

FOR SALE!

Practice in Hayward for sale. Terms negotiable. Please contact Jan at jdbufkin@pacbell.net.

We are still looking for someone to volunteer for the following position:
• **Audio/Visual Technical Advisor** – Dagmar Bedard, EA has held this position for the past several years and would like to step down. This position takes care of the microphones and projector used at our monthly meetings so needs to be someone who will be at all the meetings. Contact Dagmar if you have any questions.

Save the Date “Tax Talk 2018”
*By Patty Pringle, EA, Seminar Chair*

The East Bay Association of Enrolled Agents Annual Fall Seminar Tax Talk 2018 will be held at the Holiday Inn Dublin, CA on October 29th, 30th and 31st – this is Monday, Tuesday and Wednesday – not our normal, but these dates worked best for our speakers.

Once again, we have lined up excellent speakers:
• Beanna Whitlock, EA will present 2 hours of “Ethics” and topics to be determined
• Vicki Mulak, EA – topics to be determined
• Lisa Ihm – topics to be determined

So, stay tuned, Additional information will be in the June Bulletin.

This is a chapter sponsored event and all proceeds go back to the chapter and are used for other special events and programs for EBAEA Members. This event would not be possible without the hard work of the many volunteers that make it happen. Please let me know if you would like to join in and volunteer (you might even have fun). Your help will be greatly appreciated!

Patty Pringle, EA patty@eastbaytaxmatters.com

MEMBERS SPEAK
Upcoming presentations by EBAEA Members include:

06/12/18 – Mark Bole – Basic Payroll 9 am – 3 pm
Concord, 4071 Port Chicago Highway, Suite 250

08/08/18 – Michele Zimmerman – Basic Payroll 9 am – 3 pm, San Francisco, 745 Franklin Street, 4th Floor
Conference Room
May 2018
13 Mother’s Day
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
   Annual Meeting & Election of Officers
   Topic – Social Security – CE TBD
   Speaker - Terry Allen, CFP
28 Memorial Day

June 2018
20 EBAEA Dinner - Dublin Holiday Inn
   Installation of Officers
   Topic – IRS Appeals Process
   Speaker - David M. Fogel, EA, CPA, USTCP
24-26 CSEA Annual Meeting & Board Meeting – Reno, NV
27-29 CSEA Super Seminar – Reno, NV

July 2018
18 EBAEA Dinner - Dublin Holiday Inn

August 2018
15 EBAEA Dinner - Dublin Holiday Inn
   New Member “Meet & Greet”

September 2018
19 EBAEA Dinner - Dublin Holiday Inn
   Member Appreciation
22-23 CSEA Committee & Board Meetings
   Sacramento

October 2018
17 EBAEA Dinner - Dublin Holiday Inn
29-31 EBAEA Tax Talk Seminar – Dublin Holiday Inn

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.

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
Memorial Day or Decoration Day is a federal holiday in the United States for remembering the people who died while serving in the country's armed forces. Memorial Day originally honored military personnel who died in the Civil War (1861-1865).

The holiday now honors those who died in any war while serving with the United States. The holiday, which is currently observed every year on the last Monday of May, will be held on May 28, 2018.

5 facts about Memorial Day
By Joe Carter

1. Memorial Day is often confused with Veterans Day. Memorial Day is a day for remembering and honoring military personnel who died in the service of their country, particularly those who died in battle or as a result of wounds sustained in battle. While those who died are also remembered, Veterans Day is the day set aside to thank and honor all those who served honorably in the military both in wartime or peacetime.

2. Memorial Day was originally called Decoration Day. Three years after the Civil War, Maj. Gen. John A. Logan, the head of an organization of Union veterans, established Decoration Day as a time for the nation to decorate the graves of the war dead with flowers. Logan declared that Decoration Day should be observed on May 30 since it was believed flowers would be in bloom all over the country.

3. Until after World War I, Decoration Day was a holiday reserved for the remembrance of the Civil War dead. After the Great War the day was expanded to honor those who have died in all American wars. In 1971, Memorial Day was declared a national holiday by an act of Congress, though it is still often called Decoration Day. It was then also placed on the last Monday in May, as were some other federal holidays.

4. US War Casualties:
   - Civil War - Approximately 620,000 Americans died. The Union lost almost 365,000 troops and the Confederacy about 260,000. More than half of these deaths were caused by disease.
   - World War I - 116,516 Americans died, more than half from disease.
   - World War II - 405,399 Americans died.
   - Korean War - 36,574 Americans died.
   - Vietnam Conflict - 58,220 Americans died.
   - Operation Desert Shield/Desert Storm - 383 service members died.
   - Operation Iraqi Freedom - 4,411 service members died.
   - Operation New Dawn - 73 service members died.
   - Operation Enduring Freedom - 2,346 service members died.
   - Operation Freedom's Sentinel - 48 service members have died as of May 2018.
   - Operation Inherent Resolve - 61 service members have died as of May 2018.

5. In 2000, Congress passed the “National Moment of Remembrance Act” which designates 3:00 PM. local time on Memorial Day each year as the National Moment of Remembrance, in “honor of the men and women of the United States who died in the pursuit of freedom and peace.” Public Law 106-579 encourages all Americans to pause wherever they are at that time for a minute of silence to remember and honor those who have died in service to the nation.

With Honor & Gratitude
We Remember
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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SEE Class: vacant
Tax Talk:
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Patty Pringle, EA  patty@eastbaytaxmatters.com

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Chair: vacant
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Nominating:
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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
Laimdota Agnese Maizitis
July 31, 1936 - March 28, 2018
Resident of Dublin

Laimdota Agnese Maizitis, a resident of Dublin, CA passed away on Wednesday March 28, 2018. Her loving spirit, kind heart and soft-spoken way will be missed by all who knew her.

Laimdota was born to August and Erika Maizitis on July 31, 1936 in Riga, Latvia. She and her family were WW II refugees in Mannheim, Germany, coming to the U.S to start a new life in 1948. She completed her education in the United States earning her Bachelor's Degree from Vassar College and Master Degree from Berkeley College in CA. She began her career as a physicist with Livermore Radiation Lab. She took a hiatus to travel the world after which she taught high school for Sacred Heart Catholic High in Bridgeport, CT as well as college math for Bridgeport Engineering Institute. Laimdota became an enrolled tax agent starting her own business and was the owner and principle of Tax Solutions in Pleasanton, CA.

Laimdota is survived by her devoted husband, William McCauley, her nephew John Olmsted and family, cousins and friends. She was predeceased by her sisters Mara Maizitis and Ilza Olmsted.

Laimdota was a woman of rare character, integrity, excellence, compassion, devotion and generosity, a gentle spirit offering unwavering love and more. She had a special love for animals and being side by side with her husband, tending the garden, taking a walk, tackling a home building project or traveling the world. She was a dedicated and adored tax preparer that loved helping people above all and was deeply appreciated for her insightful help.
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?