May 2019

The Annual Meeting of the East Bay Association of Enrolled Agents (EBAEA) will be held at the EBAEA Monthly Dinner Meeting on May 15, 2019 at 7:00 pm at the Dublin Holiday Inn. The business of the Annual Meeting will include consideration of the following motion:

“The Board of Directors of the EBAEA proposes that EBAEA suspend the rule at Article 5.02 to allow Kathy Judd, EA to serve a third consecutive term as Secretary of the Association for the 2019-2020 Association year.”

Background – EBAEA Bylaws Article 5.02 limits officers of the Association to serve no more than two consecutive terms in one office.

Additionally, the EBAEA Nominating Committee has proposed the following slate of candidates for our 2019-2020 fiscal year:

- President – Gail Stan, EA
- 1st Vice President – Patty Pringle, EA
- 2nd Vice President – Sharon Hinchman, EA
- Secretary – Kathy Judd, EA
- Treasurer – Lourdes Rabara, EA
- CSEA Director – Sharon Hinchman, EA
- 2-year Directors
  - Greg Crofton, EA
  - Peggy Hall, EA
  - Continuing as Directors through 2020
    - Carolyn Krieg
    - Aida Torres, EA

May Session: Real Time Issues of Tax Professionals

Speakers:
Mark Bole, EA and Andy Rogers, EA

By going through several tax forums, we compiled a list of questions that tax professionals were asking. These are problem areas that we want to discuss. By reviewing these questions and answers we will go through important tax issues and controversies. We will review the answers that were given and we will discuss these.

We are using the NAEA, CSEA & Taxprotalk forums, as well as others the presenters bring in.
Qualifies for 1 Hour Fed CE.
any floor candidate provide advance notice to the Nominating Committee through its Chair, Sharon Hinchman at Sharon@Alamo-tax.com.

**PRESIDENT’S MESSAGE**

*by Gail Stan, EA, MBA, MLS*

Whew! Tax season may be over but I had to put 20% of my clients on extension so I am still busy doing returns. Every return seemed to take longer this year and I literally ran out of time to get them all done. Of course, it doesn’t help when clients wait until April 10 to provide their documents – 2 waited until April 15!

May is our Annual Meeting and Election of Officers. We will review the minutes from the 2018 Annual Meeting and the current financials of EBAEA. Please come and participate in the Annual Meeting and vote for the officers who will run this organization for the next year.

The presentation this month sounds really interesting. I am looking forward to the issues that were hot on the forums during tax season. I didn’t have time during the season to get into all of these forums so it will be interesting to see if we all had the same problems or different ones.

CSEA President Cynthia Leachmoore sent an email on Friday, May 3 about the state of CSEA’s finances. There is an Finance & Budget Meeting on Wednesday, May 8 which I will be attending as a member of the F&B Committee. Anyone who would like to join us is welcome to attend.

**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.

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**May 2019**

15 EBAEA Dinner - Dublin Holiday Inn
Annual Meeting & Election of Officers

15 Chapter Connection Call
2:30-4:00
Call-in information for this Webex meeting is also posted on the CSEA Website.

22 CSEA Board of Directors meeting
10am-1pm
Webex meeting, and Board Packets and call in information will be available on the Members-only Governance Documents page on the CSEA website

**June 2019**

19 EBAEA Dinner - Dublin Holiday Inn
Installation of Officers
Speaker – Scott Burnett

23-25 CSEA Annual Meeting & Board and Committee Meetings
Reno, NV

26-28 CSEA Super Seminar
Grand Sierra Resort, Reno, NV

**July 2019**

17 EBAEA Dinner - Dublin Holiday Inn

**Aug 2019**

21 EBAEA Dinner - Dublin Holiday Inn
New Member "Meet & Greet"

**Sep 2019**

18 EBAEA Dinner - Dublin Holiday Inn
Member Appreciation

21-22 CSEA Board and Committee Meetings
Sacramento, CA

Are you ready for a change!! Small boutique tax accounting firm in Lafayette needs tax accountant with strong tax, general ledger and payroll experience. The ideal candidate will possess at least ten (10) years of tax accounting experience. Ownership possibility exists for the right individual. Send cover letter & resume to: taxaccountant3403@att.net.
Join a small group meeting!

<table>
<thead>
<tr>
<th>Small Group Tax Meetings</th>
</tr>
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<tbody>
<tr>
<td><strong>Antioch /Brentwood</strong></td>
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<tr>
<td>Brentwood Café, 8500 Brentwood Blvd, Brentwood</td>
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<tr>
<td>Ken Seamann EA</td>
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<tr>
<td>(925) 634-8297</td>
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<tr>
<td><strong>Danville Area</strong></td>
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<tr>
<td>2nd Tue 8:30 am</td>
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<tr>
<td>Life is Sweet Bakery, 155 Railroad Ave, Danville,</td>
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<tr>
<td>Michael Power EA, CFP</td>
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<tr>
<td>(510) 366-8836</td>
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<tr>
<td><strong>Oakland Area</strong></td>
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<tr>
<td>4th Tue 9:00 am</td>
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<tr>
<td>Buttercup Café, 229 Broadway, Oakland</td>
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<tr>
<td>Andy Rogers EA</td>
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<tr>
<td>(510) 332-0401</td>
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<tr>
<td><strong>Livermore Area</strong></td>
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<tr>
<td>2nd &amp; 4th Thurs 8:45 am</td>
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<tr>
<td>Brick Café, 833 E. Stanley Blvd., Livermore (New)</td>
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<tr>
<td>Allison Johnson, EA</td>
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<tr>
<td>925-518-0882</td>
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<tr>
<td><strong>Castro Valley</strong></td>
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<td>3rd Tue 8:30 am</td>
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<td>Dino’s Restaurant, 20390 Lake Chabot Rd, Castro Vly</td>
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<tr>
<td>Dagmar Bedard EA</td>
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<tr>
<td>(510) 537-3883</td>
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<td><strong>Email-only Group</strong></td>
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<td>as needed</td>
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<tr>
<td>Send an email to <a href="mailto:halloftaxes@gmail.com">halloftaxes@gmail.com</a></td>
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<tr>
<td>Peggy Hall EA</td>
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<td>(925) 388-1040</td>
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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.
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.
2018 - 2019 Board of Directors and Committee Chairs

President: Gail Stan, EA gail@gailstantaxes.com
1st VP: Cheryl Meder, EA cmeder5@gmail.com
2nd VP: Patty Pringle, EA patty@eastbaytaxmatters.com
Treasurer: Lourdes Rabara, EA LRabara@ssfllp.com
Secretary: Katherine Judd, EA kjuddea@gmail.com
Immediate Past President: Sharon Hinchman, EA sharon@alamo-tax.com

Director 2018 – 2020 (2 year):
Carolyn Krieg, EA ckrieg111@msn.com
Sassa Oznowicz, EA krokholm@gmail.com
Aida Torres, EA Aida@AidaTorres.com

Director 2018 – 2019 (1 year):
Peggy Hall, EA halloftaxes@gmail.com

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

Communication Committee
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: Linda Fox, EA fox4tax@aol.com
Membership:
Sharon Hinchman, EA sharon@alamo-tax.com
Membership Ambassador:
Joanne Anderson, EA jander3812@aol.com
PIA: Cheryl Meder, EA cmeder5@gmail.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
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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:
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Audio/Visual Technical Advisor:
Eric Vale eric@vale-tax.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:
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Volunteer Coordinator:
Gail Stan, EA gail@gailstantaxes.com

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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