Offer in Compromise (OIC)
By Ralph Nelson, EA, NTPI Fellow

At our November 15th meeting, I will give a presentation on how to put together an Offer In Compromise (OIC).

What is a good amount of money to offer when filing an OIC? I've heard that 30% of the balance due is a fair amount to offer, or should I offer 40% so that my offer is more likely to be accepted? What should I offer??

The amount to offer is the Reasonable Collection Potential or RCP. The RCP is a formula-driven amount that the IRS has set up and it has absolutely nothing to do with the balance due. Case in point: a couple of my recent settlements are, Debt $385,812 settled for $11,844; Debt $49,973 settled for $22,060.

So what is the RCP? The RCP has two components, the equity in the taxpayer’s accessible assets and Remaining Monthly Income after allowable expenses are deducted. The art in settling an OIC is knowing how to use the allowable expenses. They can be tricky. There are National Standards and Local Standard that guide how much you can deduct for a particular expense. Should I always use the National and Standard deductions? No. The rules are fairly strict for an OIC but it still boils down to regular old horse trading.

That's what I will present at our November chapter meeting, how to put together an OIC and how to horse trade. Another thing I will cover is how to disqualify an OIC candidate in 30 seconds or less. This will be 2 hours of CE.

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

Here it is November already. While the 2016 tax season is finally at a close, time to rev up for next year. For those of you still needing your Continuing Ed, there will be 26 hours available to you through the East Bay Chapter. Between now and November 15, we have...
Tax Talk, followed by Practice Management with our own Duncan Sandiland, and last but not least, Ralph Nelson will give us 2 hours of Offers in Compromise at the dinner meeting.

We have pulled out all the stops this year to give you a well-rounded education to empower you into the next season. I won’t bring up that Congress hasn’t cooperated by giving us long promised Tax reform. Oh well, maybe next year.

I want to again thank Fiona Ma for taking time out of her busy schedule to fill us in on the changes at the Board of Equalization. It was very enlightening.

Christmas is just around the corner. Reminder------we have changed the date and format of the December meeting to a Mixer. Remember: December 13th. It’s the same time and place. Bring your toy for Toys for Tots and the Chapter will give you a glass of wine to go with the finger food. It’s a good chance to say hi to your friends and catch up without having to cut your conversation short for a dumb ole meeting. I look forward to seeing all of you.

“Tax Talk 2017” Registration Now Open
By Patty Pringle, EA, Seminar Chair

Tax Talk 2017, Nov. 8th, 9th and 10th
1, 2 or 3 Day Options Available
For a detailed description of topics & flyer, please check out the last pages of this bulletin.

Day 1, Wednesday, November 8th
Lisa Ihm, EA
- Tax Stuff you thought you knew (all new for 2017) (2 HRS Fed)
- Repair or Improvement? (2 HRS Fed)
Vicki Mulak, EA, CFP
- S-Corp Basis & K-1 Issues (4 HRS Fed)

Day 2, Thursday, November 9th
Vicki Mulak, EA, CFP
- California K-1’s (2 HRS CA, CTEC, NAEA)
- Single Member LLC’s (2 HRS Fed)
Lisa Ihm, EA
- Rentals... Simple! Right? (2 HRS Fed)
- Correcting Depreciation - Form 3115 Line-by-Line (2 HRS Fed)

Day 3, Friday, November 10th
Beanna Whitlock, EA
- Ethics - For the 21st Century Tax Professional (Where do you keep your ethics?? (2 HRS Fed)
- Trust Basics - a Guide to Who Do You Trust (2 HRS Fed)
- Decedent’s Final Return and Form 1041 (2 HRS Fed)
- Gifts, Estates and Trusts (2 HRS Fed)

Long-awaited Seminar Returns!
By Duncan Sandiland, EA, CFP, MSFS, NTPI Fellow

Eleven years ago, my tax practice was doing better than ever before, and was poised to take off...and it was running my life. I had to find some way to dial it back so I could spend some time with my kids before they grew up. However, no matter where I looked, all I found were ideas on how to grow a practice, not how to tame it. So, I started experimenting.

A few years later, I had significantly cut my workload, was going on almost every school field trip with my kids, and I had increased my take-home profit. Four years ago, I moved halfway across the country, normally a death knell for a tax practice. Instead of selling my old practice and starting up a new one from scratch, my experiments had made my client relationships so strong that more than 90% of my clients stayed with me and I now handle their needs remotely. My eventual retirement is completely under my control.

Would you like to have that much flexibility in your practice? Would you like to reduce your stress and your workload while increasing your profit? At the request of some Chapter members, before I moved I taught an all-day class, demonstrating the invaluable lessons I had developed by trial and error. That class was very well received, and since then I have been repeatedly asked to teach it again.

Travel schedules have finally aligned and, for one day only, the Practice Potential class is back! In conjunction with EBAEA, I will again be teaching those key lessons that are still available nowhere else. Pull out your calendar and turn it to Monday, November 13, then look over the flyer in this Bulletin, and take two minutes NOW to click on the link and sign up, as space is limited and initial response looks like the class will sell out. I am offering a money-back guarantee so the only risk you take is being slow to register and thus losing your space.

And I am still practicing and refining those lessons. As I write this, it is 3pm on a school day afternoon in early October. My son just came home from school, so I am going to put aside extended returns and go help him make brownies – because my practice is no longer the boss, I am!
CSEA LEGISLATIVE ACTION FUND
EBAEA CHALLENGE
By Gail Stan, EA, CSEA Director

As Vicki Mulak, Chair of CSEA’s Legislative Committee recently stated in an email to the Chapters, “CSEA advocates for the rights of both Enrolled Agents and taxpayers before the California State Legislature and regulatory agencies (FTB, EDD, CDTFA and SOS) in an effort to protect the rights of EAs to practice in California and for efficient and effective tax administration.

“CSEA’s legislative advocacy efforts are supported through the assistance of the Sacramento lobby firm, Aaron Read and Associates, LLC, resulting in vigilant bill watch, legislator visit campaigns and the coordination of CSEA joining in coalitions with other like-minded organizations to collectively oppose certain legislative outcomes. CSEA sponsored two successful Senate bills in 2010 and 2014 that culminated in LLC payroll conformity with EDD after more than 15 years of nonconformity.

“CSEA’s regulatory advocacy includes physical presence on the advisory boards of all the state tax agencies (FTB, EDD, CDTFA, and SOS), the annual State Tax Agency Liaison (STALM) and annual testimony at the Taxpayers’ Bill of Rights Hearing (TBRH). CSEA was instrumental in improving the annual and biennial statement of information filings with the SOS.

“But, there is a cost associated with advocacy and this is the reason for my contact. If you believe in the importance of advocacy, and when you consider that CSEA is one of the few membership organizations for tax professionals that is actively engaged in consistent, effective advocacy, would you consider a chapter donation to CSEA’s Legislative Advocacy Fund (LAF)? Donations to LAF, from chapters and individuals, are critical in ensuring that our advocacy and regulatory efforts can continue without putting an even greater strain on the CSEA budget.”

CHALLENGE: The EBAEA Officers and Board of Directors voted at our October meeting to offer a challenge to our members – the Chapter will match individuals’ contributions to CSEA’s Legislative Action Fund (LAF) up to a maximum of $1,500 for donations made by our December 13, 2017 meeting. The EBAEA check will be presented at the CSEA Board of Directors meeting on January 7, 2018 in Sacramento.

There are 2 ways to donate:
1. Write a check to EBAEA and indicate it is for LAF; mail it to the EBAEA office or bring it to a dinner meeting.
2. Donate through the CSEA website and send a copy of your receipt to the EBAEA office or bring it to a dinner meeting.

TOYS FOR TOTS

Please bring your unwrapped toy for Toys for Tots to the December meeting and the Chapter will give you a glass of wine to go with the finger food at this Mixer.

Every year for the last 200 years (maybe only 20 years) Joanne Anderson has collected toys to bring to the Fire Stations for distribution. This is a great way for us to contribute as a chapter. If you have any questions please contact Joanne at 925-938-9086. Thank you for your participation.

CSEA EDUCATION COMMITTEE
By Gail Stan, EA, CSEA Director

The CSEA Education Committee is hard at work on the 2018 Super Seminar. If you are just resurfacing after the final push to get 2016 tax returns completed, you may not be aware that there will only be one session of Super Seminar in 2018 and it will be in Reno at the Grand Sierra Resort. The expense of holding Super Seminar in Las Vegas was getting too high and none of the Hotels even responded to CSEA’s Request for Proposal. Here is the draft line-up of sessions for 2018:

- Partnerships & LLCs – 26 hours
- Representation (including appeals and collections) – 36 hours
- Individual 1040 returns – 30 hours
- Ethics – 4 hours
- A SURPRISE! – 2 hours

That is a total of 98 hours not counting the extras that may be planned during lunch or the evening. So start planning to attend Super Seminar 2018 now!
TAX PRACTICE CLIENTELE FOR SALE

Solo practice planning to downsize by 50% next tax season, looking to sell clients, very flexible terms available. Mostly middle and upper income 1040s, some S-corp, partnership, and LLC returns too. Most clients are comfortable working paperless and remotely, current year tax data files set up in UltraTax. Contact Mark at makbo@pacbell.net if interested.

November 2017

8-10 EBAEA Tax Talk Seminar – Dublin Holiday Inn
Speakers – Beanna Whitlock, EA, Lisa Ihm, EA and Vicki Mulak, EA

13 Practice Potential Seminar – Dublin Holiday Inn
Speaker – Duncan Sandiland, EA

15 EBAEA Dinner - Dublin Holiday Inn
Speaker – Ralph Nelson, EA
Topic - OICs

December 2017

13 EBAEA Dinner - Dublin Holiday Inn
This is a new date for this meeting
Not a regular meeting, this will be a Mixer with heavy appetizers. Bring a toy for Toys for Tots and receive a glass of wine from the Chapter. We will also have a competition for the “Ugliest Christmas Sweater.”

January 2018

17 EBAEA Dinner - Dublin Holiday Inn
Speaker – Park Chamberlin, EA
Topic – Form 1116 Foreign Tax Credits

Small Group Tax Meetings

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<td>Ken Seamann EA (925) 634-8297</td>
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<td>San Francisco, 455 Market Street, 6th Floor</td>
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MEMBERS SPEAK

Upcoming presentations by EBAEA Members include:

11/8/17 – Andy Rogers – Basic Payroll 9 am – 3 pm San Francisco, 455 Market Street, 6th Floor
11/29/17 – Michele Zimmerman – Basic Payroll 9 am – 3 pm Concord, 4071 Port Chicago Highway, Suite 250, Room A
12/7/17 – Mark Bole – Basic Payroll 9 am – 3 pm Oakland, 1515 Clay Street Room 9
12/13/17 – Andy Rogers – Basic Payroll 9 am – 3 pm San Francisco, 455 Market Street, 6th Floor

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.

Email-only Group
Send an email to halloftaxes@gmail.com
Peggy Hall EA (925) 388-1040
EBAEA has several positions that need to be filled:

- **2nd Vice President** – Patty Pringle 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. Please contact President Sharon Hinchman, EA or 1ST VP Gail Stan, EA if you have questions.

- **Legislative Representative** – This position is the Representative from EBAEA to the CSEA Legislative Committee. You would be responsible for attending a monthly telephone call and preferably the CSEA Committee meetings 3 times a year – currently one in June in Reno and 2 in Sacramento in September and January.

- **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.

**IN REMEMBRANCE**

Alegria U. Davenport

August 9, 1942 - October 20, 2017

Alegria was a long time Pleasanton resident
She truly loved being an EA and her interaction with the EBAEA organization.

---

**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. (*The next issue of the Bulletin will be a combined issue for December/January and will be published in early December.*)

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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Legislative:  vacant
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SEE Class:  vacant
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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
October Dinner Meeting

Fiona Ma, Chairwoman of the Board of Equalization, our guest speaker for October.
TAX TALK 2017

3 FULL DAYS • NOVEMBER 8th 9th 10th

Register today for Tax Talk 2017! Receive 22 hours Fed & 2 hours CA for all 3 days!
To receive the EARLY BIRD SPECIAL pricing, register on or before October 18, 2017

SPEAKERS

DAY 1
Wednesday
NOV 8th
Lisa Ihm, EA
➤ Tax Stuff You Thought You Knew — All New For 2017
➤ Repair or Improvement
➤ S-Corp K-1’s - How to get it on the 1040?

Vicki Mulak, EA, CFP
➤ California K-1’s - What’s the Purpose of 4 Columns?
➤ Single Member LLC’s - Disregarded For Tax Filing Only
➤ Rentals...Simple, right?
➤ Correcting Depreciation

DAY 2
Thursday
NOV 9th
Lisa Ihm, EA
➤ Continental Breakfast
➤ La Fiesta Lunch Buffet (Mexican)
➤ Natural Choice Afternoon Snack

Vicki Mulak, EA, CFP
➤ Single Member LLC’s - Disregarded For Tax Filing Only
➤ Rentals...Simple, right?
➤ Correcting Depreciation

DAY 3
Friday
NOV 10th
Beanna Whitlock, EA
➤ Ethics
➤ Trust Basics
➤ Decedent’s Final Return & Form 1041
➤ Gifts, Estates, & Trusts
➤ Continental Breakfast
➤ Rome Lunch Buffet (Italian)
➤ Fruit & Cookies Afternoon Snack
➤ Natural Choice Afternoon Snack

REGISTRATION FEES INCLUDE:
➤ Continental Breakfast
➤ Hot Lunch (Buffet & Plated)
➤ Afternoon Snacks
➤ Tax Talk 2017 Materials*

3-DAY SEMINAR
NOVEMBER 8TH, 9TH, 10TH
8:00am – 5:00pm Daily

Register Online: https://www.123signup.com/calendar?Org=ebaea (click the link) or copy/paste into your browser or visit our website at www.ebaea.org and click on the events tab

SAVE MONEY & HELP US GO GREEN

A Materials Discount is offered to attendees who choose to receive Tax Talk materials on a thumb drive with PDF files, as an alternative to receiving printed materials.
SAVE $50 for 3 day Attendees
SAVE $35 for 2 day Attendees
SAVE $25 for 1 day Attendees

Tax Talk After Hours
Wednesday* 5:30p to 7:00p
Stay and enjoy nibbles, sodas & wine during a Q&A Session

Featured Presenter: Marc Narlesky, CPA
Technical Assistant to the Advocate
Taxpayers’ Rights Office California Franchise Tax Board

Holiday Inn Dublin-Pleasanton
6680 Regional Street
Dublin, California 94568
(925) 828-7750 Direct
$119/nt

As an added accommodation: The Holiday Inn of Dublin-Pleasanton is offering “Special-Discount Room Rates” at the hotel for Seminar attendees.

BART Dublin-Pleasanton
Seminar venue is conveniently located within walking distance of BART Dublin/Pleasanton.
Easy access to I-580 & I-680 and ample free parking available at the venue.

For additional Tax Talk 2017 information, visit the website www.ebaea.org and click the events tab, or contact Patty Pringle, Enrolled Agent at (925) 320-7802 or email patty@eastbaytaxmatters.com or EBAEA Chapter Office at info@ebaea.org.

Not a Member yet? Join us today! http://www.ebaea.org/contact/
TAX TALK 2017 ● MAIL-IN REGISTRATION FORM

NOVEMBER 8th 9th 10th | 8:00am – 5:00pm Daily

Only use this Form if paying by check. One Form per attendee

INSTRUCTIONS:
Mail this completed Registration Form with check made payable to EBAEA
Mailing Address: East Bay Association of Enrolled Agents
6400 Village Parkway, Suite 201, Dublin, CA 94568

For additional Tax Talk 2017 information, visit the website www.ebaea.org and click the events tab, or contact Patty Pringle, Enrolled Agent at (925) 320-7802 or email patty@eastbaytaxmatters.com or EBAEA Chapter Office at info@ebaea.org.

REGISTRATION FEES INCLUDE:
Continental Breakfast
Hot Lunch (Buffet & Plated)
Afternoon Snacks
Tax Talk 2017 Materials

REGISTRATION FEES (must be postmarked before dates below)

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<th>MEMBER**</th>
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**MEMBERS are current Members of CSEA/Chapter
***NON-MEMBERS are not current Members of CSEA/Chapter

LESS MATERIALS DISCOUNT $__________
TOTAL PAYMENT ENCLOSED $__________

SAVE MONEY & HELP US GO GREEN!
A Materials Discount is offered to attendees who choose to receive Tax Talk materials on a thumb drive with PDF files, as an alternative to receiving printed materials.

YES (check)

SAVE $50 for 3 days
SAVE $35 for 2 days
SAVE $25 for 1 day
East Bay Tax Talk 2017
Course Descriptions

DAY 1 – November 8th

- Lisa Ihm, EA
  Tax Stuff you thought you knew (all new for 2017) (2 HRS Fed)
  ❖ We’ve all had those “light bulb” moments when we realize that we’ve been missing out on a great tax deduction for a client or have overlooked a perfect tax planning opportunity. These revelations come from many sources. Sometimes it’s the one really useful piece of information we learn at a seminar, or a colleague mentions something at lunch that gets us to thinking, or we are researching another tax topic and come across something totally unexpected. You are in “Jeopardy” of having fun while you learn in this fast-paced seminar. All NEW topics for 2017! You’ll have at least one “AH HAH!” moment, guaranteed!

- Repair or Improvement? (2 HRS Fed)
  ❖ Can you expense a new kitchen in a rental property? Or a new furnace? Or new windows? Or a new fence? The answers may surprise you!!! New regulations recently issued by the IRS provide guidance to help answer the common and difficult question of whether expenses are deductible as maintenance or must be capitalized as improvements, and may make it possible to deduct many items you would have capitalized in the past! A handy flowchart will lead you through the required questions.

- Vicki Mulak, EA, CFP
  S-Corp Basis & K-1 Issues (4 HRS Fed)
  ❖ This session will concentrate on the transfer of flow-through items reported on the S Corporation K-1 to shareholder returns, with an emphasis on the calculation of S Corporation stock basis and loan basis. Included will be information on the impact of distributions and loan repayments on basis, the differences between the stock basis ordering rules and the AAA ordering rules, the shareholder election to reverse the ordering rules and the specific accounting election when shareholders participate for less than full tax years.

DAY 2 – November 9th

- Vicki Mulak, EA, CFP
  California K-1’s (2 HRS CA, CTEC, NAEA)
  ❖ Unlike the federal K-1, California uses a 4-column K-1 for partners, LLC members and S Corporation shareholders. Although seemingly complex at first blush, this session will unravel that complexity in an easy-to-understand manner. When preparing returns with K-1’s, the entity return preparer needs competency in understanding apportionment and California source income. When preparing personal tax returns, understanding the impact of residency and non-residency is the key concept which enables the tax professional to transfer K-1 data accurately.

- Single Member LLC’s (2 HRS Fed)
  ❖ This session will examine the issues associated with a single member LLC (SMLLC). Although they are regarded for legal and business purposes, they are disregarded for tax filing purposes, thus creating a level of confusion which requires constant guidance by the practitioner. Understanding this distinction is important so that the practitioner’s interaction with the SMLLC is the same as their interaction with a one-person C or S Corporation. The fact that the individually-owned SMLLC files on the sole-proprietor’s schedule does not change the fact that they are an entity and must conduct their business as an entity.

- Lisa Ihm, EA
  Rentals... Simple! Right? (2 HRS Fed)
  ❖ Roommate… Rental to family member… Occasional rental… Vacation home… Bed and Breakfast… Less than 7-day average rental… Less than 14 days personal use… Extraordinary services provided… Foreign exchange student… Less than FMV rent… Passive loss limitations… 280A limitations… Joint ventures… The list of complications is endless. Learn how to handle all these glitches using an AMAZING flowchart that will lead you to the correct answer step-by-step.
Correcting Depreciation - Form 3115 Line-by-Line (2 HRS Fed)

- Have you ever had a client who was not depreciating their rental property? Or one who was depreciating the land as well as the building? The Form 3115 is the way you must make corrections in these types of situations. Many preparers had their first exposure to Form 3115 when they filed them for clients who were affected by the new personal property regs. Most of those taxpayers were able to file a “Short Form 3115”, but in other situations where filing a Form 3115 is beneficial to a client you must complete the entire 8-page form. We'll dissect this complex form line-by-line and determine what all that incomprehensible language means. More importantly, you’ll get some valuable templates and learn some amazing shortcuts that will help you complete this 8-page form in mere minutes!

DAY 3 – November 10th

- Beanna Whitlock, EA
  Ethics - For the 21st Century Tax Professional (Where do you keep your ethics??) (2 HRS Fed)
  - Program begins with the premise that others will follow your lead when it comes to acting ethically. Various areas of Circular 230, Federal Code of Regulations will be reviewed in order that we have some guidance when we are faced with ethical dilemmas. Finally, we will review 3 separate case scenarios where our ethics will be challenged and determine how we can use Circular 230 to resolve our issue. Practitioners will learn that it is not the ethical encounter that is the issue but how we deal with it.

Trust Basics - A Guide to Who Do You Trust (2 HRS Fed)

- Attendees will receive an overview of trust basics, discovering the differences between Simple and Complex trusts and when all trusts are Complex. The Grantor trust will be examined and preparers will be informed on the workings and tax reporting's. Various types of trusts and why clients may be looking to use them are examined. Who is right for a trust and who is not will be discussed. The Intentionally Defective Grantor Trust, the new kid on the block, will be reviewed and attendees will be comfortable addressing these issues with their taxpayers.

Decedent’s Final Return and Form 1041 (2 HRS Fed)

- Examining a case example from death to settlement of estate, preparers in attendance will examine what is reported on the final 1040 and what is reported on the Estate Tax Return, Form 1041. Practitioners will learn what IRD, Income in Respect of Decedent, is and how to treat it on the tax return. Various issues of working with the Last Will and Testament and any Trust created by the Will (Testamentary) will be discussed. Those in attendance will learn a greater understanding of the decedent's final return and the estate created at death.

Gifts, Estates and Trusts (2 HRS Fed)

- A review of the current rates for gifts and estates as well as Generation Skipping Trusts will begin the presentation. Form 706 discussions will concentrate on the issue of portability and how to complete the Form 706 with the new procedures for late election. Participants will learn who the candidates for filing the Form 706 are and how to protect themselves from potential law suits brought by heirs when no Form 706 is filed.
ARE YOU RUNNING YOUR PRACTICE?

-OR-

IS YOUR PRACTICE RUNNING YOU?

Practice Potential Seminar
by: Duncan Sandiland, EA

- Are you worried about the Trump proposal to simplify tax returns?
- Do you feel you’re working harder than you used to?
- Are you tired of dealing with some clients but you can’t afford to fire them?
- Are you looking to increase your income without increasing your workload?
- Would you like to ease your workload without affecting your income?
- Are you struggling with attracting the right kind of client?
- Are you tired of missing family time, or vacations, or hanging out with friends?
- Are you considering retiring or downsizing but want to get the best price for your practice?
- Are you happy with your practice but want to have more FUN with it?

Duncan Sandiland, EA had all those questions, so he created a way to cut his practice and workload in half while increasing his total bottom-line net profit.

“Like you, I have read or heard hundreds of practice management tips and tricks. While some of those are useful for short-term issues, none address the life-affecting questions listed above. This class dares to be different. It tackles the really tough issues that others won’t. Yes, you will leave with many useful tips, but most importantly, you will have your own personal plan to identify what is really important to you and how to rearrange your practice so it truly serves your needs, instead of what you have now.”

Space is limited, so sign up today and put it on your calendar!

Monday, November 13, 2017 9:30am – 5:30pm (7 full hours)
Includes lunch, starting at 9:30am so you don’t have to fight commute traffic! *No CE credit now, but that may change

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Seminar venue is conveniently located within walking distance of BART Dublin/Pleasanton.
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--MM (repeat attendee) 24 years in practice

This class will teach you how to lower your stress, increase your profit, have more fun... and has a money back guarantee.

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MONEY BACK GUARANTEE: If you follow the instructions in this class and do not increase your revenues next tax season by at least TEN TIMES the cost of the class, Duncan will refund your entire class fee. Conditions apply, contact Duncan for details.
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? ____________________________