



The Bulletin



East Bay Association of Enrolled Agents
*To Enhance and Protect the Professional, Economic, and
Educational Interests of all Enrolled Agents*

February 2007

General Meeting

NEXT MEETING Wed, February 21, 2007

Place: **PLEASANTON Crowne Plaza Hotel** (go to http://www.ichotelsgroup.com/h/d/cp/1/en/hotel/sfopl?_requestid=103835 then click on Map/Directions)

4:30 Board Meeting

6:15 Hospitality

6:45 Dinner Buffet

8:00 Program: **FTB Tax Panel**

Cost: \$35.00 with reservation by Friday February 16
\$45.00 with reservation after deadline

ALL STANDING RESERVATIONS ARE CANCELLED!

**NEW REGISTRATION
PROCEDURE – YOU MUST
READ ARTICLE ON PAGE 2**

February Topic: “FTB Tax Panel”

Speakers: Karen Brosi and Steve Sims

This month we will have a panel discussion on California tax issues. The session will be transcribed and distributed to the members (thanks to Mike Power). **It is crucial to e-mail your questions to Mike Power (michael.power@PowerInvesting.Net) by the afternoon of Monday, Feb. 19th, if you want to have the best chance of having them answered.** Questions will be taken during dinner, but they will be answered in the order received, with all the emailed questions going first. If your question is complex, PLEASE email it in early so the panel will have a chance to research it before the event. Also, sending your question in advance allows Mike to spend his limited time that evening focusing on

the answer to your question instead of writing the question itself, so he can transcribe a better answer for you at the event.

As in years past, the transcribed questions and answers will be emailed to everyone on the Chapter NEWS mailing list, so if you’re not signed up for that, go to <http://ebaea.org/cgi-bin/dada/mail.cgi> and select the NEWS list from the pull-down menu and follow the simple instructions to subscribe to that email list.

Our panelists will be Karen Brosi, EA, CFP®, and Steve Sims, EA, who is from FTB. Steve is one of the few FTB employees you’ll ever meet who is also an EA. He has been with FTB for 22 years (I guess he was about 17 when he started there) and has worked as an auditor, collection supervisor, and project manager. He is currently the manager of Community Services and Small Business Outreach. Steve is living proof that good guys do sometimes wear black hats.

Karen, whom I’m sure most of you know of, has been practicing in Palo Alto for over fifteen years. She is a Certified Financial Planner® and an Enrolled Agent. She was a senior tax specialist and director of financial planning at a respected Palo Alto CPA firm before forming her own practice. Karen is a past-president of Golden Gate Chapter and past officer of CSEA. She lectures with Spidell Publishing, is often a speaker at the Super Seminars, and writes content for Spidell’s CA Taxletter and Elder Client Planner. She is also my own most favorite speaker!

by Phil Fiegler EA, CPA, Program Co-Chair

PRESIDENT’S MESSAGE

by Bonnie Buhnerkempe EA, CFP®, CSA

Tax season is upon us. For help with tax questions or for people to commiserate with, remember the small groups in your area. Plus we have the dinner meeting as a great place to get questions answered. Phil Fiegler and Charleen Daefield already have people scheduled for both the February and March dinner meetings to answer our questions.

We finally have the new job position description for the breakdown of the chapter office duties. We have broken the job down to five main functions. This way, more people can become involved without the time demand falling on any single person and to reduce the chance of someone getting burned out. Refer to the descriptions in this bulletin and volunteer quickly, since I know one position has already been taken.

CRITICALLY IMPORTANT - NEW DINNER REGISTRATION PROCESS STARTS NOW!

by Bonnie Buhnerkempe EA, CFP®, CSA

Yes, you no longer have to wait for someone to answer the phone or call you back. You can register for the dinner meeting on-line by going here:

<https://www.123signup.com/calendar?Org=ebaea>

For now, PLEASE bookmark this URL. We will be working to set up a link directly from our website so when you get the bulletin you can register at the same time. You can even register for the January through June dinner meetings now instead of doing it during tax season. If you are like me I try to get everything off my schedule during tax season except for actually seeing clients and preparing taxes. The first time you go to register you will need to put your name, address, phone, and email address into the system. In the future you will only have to put in your name then proceed with what event you want to register for. When you register you will get an email back confirming your registration.

Addendum from Duncan:

I expect there will be a number of comments regarding this change, so I'd like to spare myself untold hours of explanation by addressing the major issues up front. There are two main reasons for this change.

The first reason is that, in response to the announcement of my resignation and the repeated calls for a new Chapter Office provider, no one stepped forward to fill the existing position. Consequently, we no longer have a labor force to handle registrations, so we had to find a way to automate the function.

The second reason is that too many members have been abusing the reservation policy. Our dinner fee barely covers our costs, so not only do no-shows and at-the-doors mess up the room seating and food supply, we still have to pay for the number of dinners reserved. At the November and December dinner meetings, nearly 20% of those who had reservations failed to show, at an annualized cost to the Chapter of about \$3,000. From now on, the only way to reserve your spot is to pay in advance through the website or to buy the annual subscription plan.

THE OLD STANDING RESERVATION LIST IS NO LONGER IN EFFECT. IT IS DEFUNCT IN

ALL RESPECTS. You must register online from now on or you will be charged the at-the-door price.

Procedural notes: From now on, all registration (dinners, miniseminars, TaxTalk, etc) will be handled through this website. As Bonnie mentioned, you will need to register once, then just sign in on future visits. You can register (and pay) for as many events as you wish, and you will get email confirmations for every event. There will be no question of postmark date, or phone messages not received, etc.

Those who bought the annual dinner subscription do not need to do anything for dinner meetings. We have already registered you for the remainder of your subscription. You will still need to sign up for other Chapter events as they are announced.

The official cancellation and other policies will be finalized after we get a bit of experience with the system. For now, if you cancel before the deadline we'll either credit your payment towards a future event or cut you a refund check. If you cancel after the deadline, you can either consider your registration a contribution to the Association or you can find someone to go in your place and notify us accordingly.

Starting in February, we are trying out a test procedure to accept checks. If you do not wish to pay online by credit card, you may send a check to the Chapter Office and we will register you accordingly. Note that the Friday deadline still applies, so please call or email us to let us know you're sending in a check..

NEW SMALL GROUP IN CASTRO VALLEY

by Dagmar Bedard, EA

We meet every 3rd Tuesday at 8:00am at Carrow's Restaurant 2723 Castro Valley Blvd at Lake Chabot Rd, Castro Valley. Dagmar Bedard EA (510) 537-3883

EBAEA AMBASSADORS

In an effort to promote networking and member retention, the East Bay chapter is launching an exciting opportunity. We are looking for Ambassadors to "work" the monthly dinner meetings. The role of the Ambassador is pretty simple: 1) When a new member comes to their first few meetings and is trying to get to know people, be willing to introduce them around, invite them to sit at your table, and include them in conversations. Have you considered yet a way to be involved? Is this something you can do? Well, can you answer warmly when a stranger comes to ask you a question? Can you introduce people? If you said yes, you could be an Ambassador! And best of all, this does not require a once-a-month-for-a-whole-year commitment. Can you do this for at least 3 meetings a year? This will also be a great way for YOU to meet some of the new members that come in and be instrumental in making them see the benefit of coming back.

If this Ambassador Program sounds like something you can help us with, please contact Judi Gilmer, EA at 925-373-1468, or call the Chapter Office at (800) 617-1040. No one should ever leave a dinner meeting feeling like an outsider. The East Bay Chapter is about Education and Networking, and the first contact for that is at our dinner meetings. You CAN make a difference in another EA's career!

NEW CHAPTER OFFICE DUTIES

As Bonnie mentioned, the traditional Chapter Office has been split into five separate bite-sized positions with the following approximate job descriptions, **AND NOW WITH COMPENSATION OFFERED FOR EACH POSITION.** The final duties will change slightly from time to time as we reassess our Chapter's needs. For more information, please call Bonnie:

- Dinner Meeting Coordinator
- Seminar Registrar (POSITION ALREADY FILLED)
- Bulletin Editor
- Webmaster
- Chapter Office

Dinner Meeting Coordinator (est 4 hours/month)

This position takes care of all administrative (non-Program) aspects of the monthly dinner meetings, including:

1. Site selection (book venues one year out for maximum planning time)
2. Menu selection
3. Liaison with hotel staff, including calling in final head count
4. Input future events into online reservation system
5. Maintain list of prepaid and complimentary dinner subscribers
6. Provide final registration list to greeters
7. Provide Member registration assistance as necessary

Compensation: one free dinner subscription

Seminar Registrar (est 5 hours per miniseminar, 20 hours for TaxTalk)

This position takes care of all registration aspects of a particular educational event, including:

1. Input future events into online reservation system
2. Coordinate meal registrations if needed
3. Produce badges for registrants
4. Provide final registration list to greeters
5. Provide registration assistance as necessary, including online registration of attendees who register by mail
6. Monitor Member/non-Member discounts

Compensation: one registration for that event

Bulletin Editor (est 4 hours/month)

This position takes care of all aspects of the monthly Bulletin newsletter, including:

1. Prompting relevant parties for article submission
2. Maintaining reserve of useful filler
3. Editing submitted articles for style and grammar

4. Formatting articles into a professional-looking publication
5. Transmitting finished product to Webmaster for distribution
6. Producing semiannual postcard calendar mailed to all Members

Compensation: one free dinner subscription

Webmaster (est 5 hours/month)

This position takes care of all aspects of the Chapter website and email channels, including:

1. Update the webpage with each new issue of the Bulletin
2. Update the webpage with each new Chapter educational event
3. Coordinate with Dinner Meeting Coordinator and Seminar Registrar to ensure all registration-enabled events are properly accessible through the Chapter website
4. Maintain appropriate other website content
5. Maintain email distribution lists for Bulletin and News subscribers
6. Format and transmit email broadcasts as appropriate
7. Perform annual synchronization with CSEA email database
8. Maintain and de-spam incoming generic Chapter email accounts
9. Set up and maintain dedicated Chapter topic-based listservers

Compensation: one free dinner subscription

Chapter Office (est 6 hours/month)

This position is the public persona of the Chapter, and also takes care of all banking and archive aspects of Chapter administration, including:

1. Answering the Chapter toll-free phone line, making referrals as necessary
2. Receiving all Chapter faxes and forwarding them to the appropriate parties
3. Receiving Chapter mail via POBox and transmitting mail to the appropriate parties
4. Maintain current membership lists and related lists
5. Make bank deposits at least twice monthly as needed
6. Store historical Chapter records (1 filing cabinet+)
7. Update and maintain Chapter records per the Chapter record retention guidelines
8. Coordinate SEE class inquiries and registrations
9. Oversee other four positions to maintain overall accuracy and consistency

Compensation: one free dinner subscription

SAVE THE DATES

In 2007 CSEA's Super Seminar will have 1 session in Reno and 2 sessions in Las Vegas. The dates are 5/31 to 6/2 in Reno, and 6/11 to 6/13 or 6/14 to 6/16 in Las Vegas. The catalogs were mailed in December but you can check out the speakers and the topics and hotel info and even register at the early-bird discount rate right now at <http://www.csea.org/superseminar>.

HELPFUL HINT RE EA NUMBER

Have you ever gone to a continuing education event and found that you couldn't complete your CPE form because you couldn't remember your EA number? Try this: enter your EA number as a phone number and the name as "EA" in your cell phone. (Now you just have to remember to have your cell phone with you!)

OFFICE SPACE TO LEASE

Office to sublet: Sunny, private 130 sq.ft. air-conditioned office on second floor in prime Rockridge, Oakland location. Share 415 sq.ft. common space with two other tax professionals. Includes access to copier, fax machine and tax library. Walk to BART. Easy freeway access. Available November 1, 2006. \$775 includes all utilities. 510-655-9893. Sheila Khalov, EA

HELP WANTED

Lodestar Private Asset Management LLC, an independent RIA in Alamo, is seeking an E.A. with an established client base to join our growing wealth management office and provide tax services to our clients. Excellent opportunity for referrals from in-house fee-only CFPs, Investment Advisors, and Estate Planning Attorney. Please contact Scott Miller (925) 838-1234 for more information.

NEW EA LOOKING TO HELP YOU

Yvette Koehler, EA (new member) is willing to do your simple easy returns and take them off your hands. Call (925) 735-2407 or email to ykoehler@sbcglobal.net. I thank you very much, Yvette.

OFFICES FOR LEASE

Three individual offices in a shared elegant 1920 office suite that overlooks Lake Merritt. The unit is shared with a Tax and Financial Planning practice and may be an ideal situation for a person just beginning their own tax practice. Options of larger or smaller offices, with/without lake view. Each office has its own charming character, all are light and airy. This suite has a front and rear entrance and shares a waiting room, large kitchen and bathroom. The building is secure, with ample parking in area. There is easy access to the 580 Freeway; 1.5 miles to Oakland City Center, and easy access to public transportation. Wired for DSL and phones. Lease negotiable. Please call 510-444-0500.

HELP WANTED

Tax Preparer needed full time during tax season and part time the balance of the year. Quick Books, 10 key by touch, payroll tax reporting and phone skills all very helpful. Salary based on experience. Office in Danville. Fax resume and salary requirements to 925-855-0844.

TAX PROFESSIONAL WANTED

Fremont Business Services Firm seeking year-round degreed tax professional to join our firm. We are looking for a team player with over five years experience preparing individual, corporate, LLC and partnership tax returns. Experience in preparing fiduciary and nonprofit returns is helpful. Candidate must be experienced in QuickBooks and the use of tax software. Enrolled Agent or CPA preferred. E-mail resume to yvonnetbc@aol.com or Fax to 510-657-9503.

OFFICE STAFF WANTED

Full-service tax and financial services firm has an opening for one talented office administrator/junior professional person needed full time during tax season and part time the balance of the year. General office skills preferred, especially good phone skills, and some degree of experience in QuickBooks/basic accounting, basic tax preparation and computer/internet skills will be helpful but not required. The most important requirements are an outgoing attitude and a hunger to learn, as this is a fantastic opportunity to absorb a wide array of knowledge in many different fields. Salary based on qualifications, benefits also offered. Office located in Walnut Creek area. Fax qualifications to 925-691-1041.

TAX PREPARER PART TIME

A growing Tax and Financial Planning Firm is seeking a tax preparer part time from mid- January through April 15. The candidate should have at least 2 years tax prep experience. A working knowledge of Lacerte is a plus. Additionally, bookkeeping skills and knowledge of Quickbooks would ensure continued part-time work throughout the year. Compensation is negotiable and commensurate with experience. Please email your resume to earthfreed@gmail.com or fax to 510-444-5166.

CALENDAR OF EVENTS

Mark your calendars

February 2007

- 21 EBAEA Dinner Meeting
FTB Panel: Steve Sims and Karen Brosi
Crowne Plaza Hotel, Pleasanton

March 2007

- 21 EBAEA Dinner Meeting
IRS Panel: Joe Calderaro
Crowne Plaza Hotel, Pleasanton

April 2007

No meeting – catch up on lost sleep!

Small Group Tax Meetings

Antioch /Brentwood Every Fri 8:00am
Brentwood Café, 8500 Brentwood Blvd, Brentwood
Ken Seamann EA (925) 634-8297

Oakland/Berkeley 3rd Fri, 10:30am
Park Avenue Grill, 4184 Piedmont Ave at Linda, Oakland
Philip Fiegler EA (510) 530-1174

Danville Area 4th Tues, 9:30am
Pascals French Oven, 155 Railroad Ave, Danville
Michael Power EA (510) 366-8836

San Ramon 2nd & 4th Fri, 7:30am
Contact Bonnie for location
Bonnie Buhnerkempe EA (925) 855-0829

Livermore Area 1st & 3rd Wed, 7:30am
Beebe's Sports Bar&Grill, 915 Club House Dr, Livermore
Richard Goudreau EA (925) 606-6672

Castro Valley 3rd Tues, 8:00am
Carrow's, 2723 Castro Valley Blvd@Lake Chabot, CV
Dagmar Bedard EA (510) 537-3883

South Alameda County 1st Wed, 9:30am
Dino's, 1 block W of I-880 on Industrial Blvd, Hayward
Sal Romo EA or Walt Thomas EA (510) 487-1691

2006 - 2007 Board of Directors and Committee Chairs

Web Page <http://www.eastbayea.org>

President: Bonnie Buhnerkempe EA, etc 925-855-0829
1st VP: Thomas Johnston EA 925-828-4500
2nd VP: Walter Nygaard EA, etc 510-547-0440
Treasurer: Clare Flores EA 510-785-8356
Secretary: Peggy Hall EA 925-388-1040
Past President:
Duncan Sandiland EA, etc 925-691-1040
2 Year Directors:
Philip Fiegler EA 510-530-1174
Barbara Sparks EA 925-634-8630
Norman Madge EA 408-398-5737
Charleen Daefield EA, etc 925-872-4075
1 Year Directors:
Janet Bridges EA 510-538-0401
Judi Gilmer EA 925-373-1468
Joanne Harteau EA 510-683-4688
Eleanor Power EA 510-525-9987
Dagmar Bedard EA 510-537-3883

Communication Committee, (2nd VP)
Chair: Walter Nygaard EA 510-547-0440
Membership: Barbara Sparks EA 925-634-8630
Judi Gilmer EA 925-373-1468
Outreach: (vacant)
Public Affairs: Michael Barrick EA 510-339-7039
Social Affairs: Janet Bridges EA 510-538-0401

CSEA Directors: Thomas Johnston EA 925-828-4500
Walter Nygaard EA 510-547-0440

Education Committee, (1st VP)

Chair: Tom Johnston EA 925-828-4500
Inter-chapter Liaison: (vacant)
Tax Talk: Diane Jaworski-Faulhaber EA 510-538-0948
Program: Philip Fiegler EA 510-530-1174
Charleen Daefield EA 925-872-4075
Scholarship: Norm Madge EA 510-489-8713
Continuing Ed: Joanne Anderson EA 925-938-9086
Mini Seminar Team: (vacant)

Administration Committee (IPP)

Chair: Duncan Sandiland EA, etc 925-691-1040
Audit: Lonnie Gary EA 650-559-5124x2229
Bylaws/SOP: Sal Romo EA 510-417-9492
Budget & Finance: Walt Thomas EA 510-725-8356
Chapter Off.: Bonnie Buhnerkempe EA 925-855-0829
Legislative Affairs: Lillian Lea EA 510-526-2220
Nominating: Kim Kastl EA 510-537-2122
Strategic Advisory: (vacant)
Bulletin: Duncan Sandiland EA, etc 925-691-1040
TAX Agency Liaison:
LaRee Jensen-Graham EA 510-601-0409

EAST BAY ASSOCIATION OF ENROLLED AGENTS

POBox 23125
Pleasant Hill, CA 94523
(800) 617-1040
(925) 691-1866
fax (925) 465-7474
e-mail: [ebaean@ebaean.org](mailto:ebaea@ebaean.org)