



The Bulletin



East Bay Association of Enrolled Agents

To Enhance and Protect the Professional, Economic, and Educational Interests of all Enrolled Agents

June, 2006

General Meeting

NEXT MEETING Wed., June 21, 2006

Place: **Spenger's Berkeley**

4:30 Board Meeting

6:30 Hospitality

7:00 Dinner Buffet

8:00 Program-OIC

Cost: \$35.00 with reservation by 5pm Fri. 6/16
\$45.00 without reservation

Reservations: (800) 617-1040
email: registration@ebaea.org

STANDING RESERVATIONS

Our Chapter maintains a "Standing Reservations" list for those EAs who attend most monthly meetings. If you are on this list, you need to contact the Chapter office only if you will NOT be attending the meeting. If you wish to be added to or removed from the "standing reservations" list, call (800) 617-1040

This month each dinner meeting attendee is to choose a main dish. The choices are Rainbow Trout or Beef Sirloin. If we do not hear from you by 5PM on Friday 6/16 regarding this choice, you will automatically be served the beef!

06/21/2006	EBAEA Dinner Meeting OIC IRS Harley Gee Reg. 6:00 pm Dinner 7:00 pm Spenger's, Berkeley 1919 Fourth Street Berkeley CA
07/19/2006	Charitable Remainder Trust Frank Acuna

President's Message

By Bonnie Buhnerkempe EA, CFP, CSA

We are starting a new year and the retreat brought out a lot of great new ideas. Thank you to all who attended the retreat and shared your ideas. We will be trying some new things so please read the article that goes over the new Ambassador program we will be starting.

Do you enjoy writing? If so we need your help to write an article for the bulletin.

We will be trying a lot of different things this year so we can get a chance to see what will work well and what doesn't. If an idea doesn't work we will move on and try something else. Please bear with us as we try different things to see what works the best. If you like particular ideas or if you have an idea you want us to try please let us know. Remember this is your chapter and we want you to be proud of what we're doing.

Offers in Compromise Q & A Panel

By Philip Fiegler, EA, Program Chair

Please remember that we are at Spenger's in Berkeley and dinner will begin at 7 PM. Our meeting this month will be another winner. Our guest is Harley Gee, IRS Group Manager for OIC in Oakland. We are planning a Q & A panel format. This is an exciting opportunity to bring in any scenarios or questions you have regarding OIC. Harley will respond to scenarios as well, so if you have a situation where you are wondering if you can get an offer done, or what you will need to get an offer done, bring it on.

Please email your questions or scenarios to the chapter office (ebaea@ebaea.org) no later than Friday night, June 18th, so that we may get the information to Harley in time.

Harley is a San Francisco native and graduate of U.C. Berkeley. He has worked in Collection for IRS for 28 years and served as a Group Manager for the past 22 years. From 1987 to 1993 he was the Group Manager for the Bay Area's Employment Tax Examination Program. Since 1993, Harley has been the Offer in Compromise Group Manager.

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!

MARK YOUR CALENDARS

Save the Date: Monday, August 21, 2006

Art Werner presents "Estate & Financial Planning for the Older Client"

What you will learn:

Understanding Medicare

Types of Life Insurance and the issues specific to the elder insured

Overview of Medigap Insurance

Understanding Social Security Issues

Issues surrounding the structure of long-term care insurance

Medicaid planning and its implications with trusts, insurance and annuities

Planning tips using Roth and other IRAs
Special estate planning issues for the older client
Housing and care alternatives
Gifting issues for the older client
8 Hours CPE for EA's and CFP's
Cost \$189.00, includes lunch

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.

IT IS NEVER TOO EARLY TO PLAN AHEAD

Word has come to us that the usual site of the CSEA Super Seminar in Las Vegas – the Stardust Hotel - is scheduled to be demolished and so will not be available in 2007. However the new location will be the South Coast Hotel & Casino and there will be two consecutive Super Seminars. The dates are 6/11/07 – 6/13/07 and 6/14/07 – 6/16/07. Also, there will still be a Super in Reno but the one in Hawaii will be eliminated

TAX PRACTICE WANTED

An EA interested in buying a Tax Practice.

Will consider immediately buying part or all of a practice, or a gradual multi-year buy-in transition. Prefer Hayward/Castro Valley/Pleasanton and surrounding areas. Contact mchang402@cs.com

REMINDER - NEW DINNER POLICY

As most of you know, the cost of everything keeps going up and we have been trying to keep the price of the dinner meeting low. This means we have been losing money. Since that is not a financially responsible thing to do, at the February Board meeting we had a good debate on how to handle the situation. The conclusion was to raise the price of the dinner meeting but to have a larger discount if you register on time.

Therefore, the cost of the dinner meeting effective May, 2006 is \$45 but there is a \$10 discount if you register by 5:00PM the Friday preceding the meeting. If you have a reservation and need to cancel for some reason, you will need to do so by 5:00PM on the Friday preceding the meeting to avoid being charged. If you register at the door the cost is \$45 as long as there is room (so if you register early, the price is only \$35). If you make a reservation and do not show you will be charged. For those of you who have purchased the subscription plan you will not have a change until the renewal of the subscription.

Breakfast Tax Meetings

Antioch /Brentwood

Brentwood Café, Brentwood

Every Friday 8:00 a.m.

Ken Seamann, EA (925) 634-8297

San Ramon

2nd Friday of Month 7:30 am

Bonnie Buhnerkempe, EA (925) 855-0829

Danville Area Pascals French Oven

155 Railroad Ave. Danville

4th Tues of the Month 9:30am

Michael Power, EA (510) 366-8836

Livermore Area

Beebe's Sports Bar & Grill

915 Club House Dr. Livermore

1st & 3rd Wed. 7:30 am

Richard Goudreau, EA (925) 606-6672

Oakland/Berkeley

Contact Phil for details and location

Philip Fiegler, EA (510) 530-1174

So. Alameda County

1st Wednesday of the month,

9:30 am Dino's- Hayward

1 block West of Hwy 880 on Industrial Blvd.

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 Clara Flores, EA

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

Charlene Deerfield, EA 925-872-4075

1 Year Directors-

Janet Bridges, EA

Judi Gilmer, EA. 925-373-1468

Joanne Harteau, EA

Eleanor Power, EA 510-525-9987

Vacant

Communication Committee, (1st 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

CSEA Directors: Thomas Johnston, EA 925-828-4500

Walter Nygaard, EA 510-547-0440

Education Committee, (2nd 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

Charlene Deerfield, 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 925-691-1040

Audit: Dave Britton, EA, CPA 510-794-1040

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: James Hassing, EA 925-831-8945

Bulletin: Eleanor Power, EA 510-525-9987

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: ebaea@ebaea.org