



Golden Gate Chapter Newsletter

California Society of Enrolled Agents

January 2010

www.ggcea.org

Monthly Chapter Meeting

Thursday January 14, 2010

The Golden Gate Chapter proudly presents:

ROBERT PEPPER

SOCIAL SECURITY RETIREMENT & MEDICARE BENEFITS

Robert Pepper is a Public Affairs Specialist in the San Francisco office of the Social Security Administration. He has served in various positions with SSA for over 30 years. In his current position, he strives to promote a better understanding of Social Security to the public. Join us on January 14, 2010 and learn:

- * When Do I Need to Apply to Receive Benefits?
- * How to Calculate the Retirement Benefit.
- * How Much Can I Earn & Still Receive Benefits?
- * What Income Counts Toward the Limit?
- * Who Can Get Medicare & When to Sign Up for Medicare?
- * What Information is Available on Social Security Online?

Grosvenor Airport Inn

380 South Airport Blvd., South San Francisco

4:30 pm Board Meeting - All Members Are Welcome

6:00 pm Social/Networking **6:45 pm** Dinner **7:30 pm** Continuing Education

Dinner: Petrale Sole Chardonnay Vegetarian: Cannelloni Florentine

Dessert: Cheesecake

No Host Bar & No Host Wine

*Make your required dinner reservation by **Midnight, Monday, January 11, 2010.***

Register at www.ggcea.org

Dinner Reservation Policy: Attendees **with** a Reservation \$35.00 Attendees **without** a Reservation \$40.00

If you made a reservation **you must cancel if you cannot attend.** Otherwise, you will be billed for the amount of the dinner.

New Prices - due to increased costs, beginning with the February 2010 meeting
Members with reservations - \$40 Members and other attendees without a reservation - \$45

President's Message

By Denis Maurer, EA



I hope everyone had a wonderful Holiday Season and a Happy New Year. It's now time to prepare for "Tax Season" and gear up for the many hours of work and deadlines that lay ahead.

It is also time to send out your organizers and engagement letters, but this year please remember to include Consent for Disclosure of Tax Return Information form. This disclosure will allow you to comply with the new regulations regarding Tax Planning for clients using their tax return information. (See page 4)

The Golden Gate Chapter will have a half-day Tax Season Kickoff Seminar on January 28, 2010. Our Speakers will be Claudia Hill, EA and Karen Brosi, EA. Claudia will keep us abreast of changes to existing forms, instruct us on the new L and M forms, and let us know about pertinent rule changes and new rules (e.g., Energy Credits and the new Home Buyers Credit). Karen will help us understand the ins and outs of Cancellation of Debt, which will include Foreclosures and Short Sales and best practices for COD treatments for Business, Investment and Residential Properties. This is a seminar not to be missed.

For Chapter Members who attended the Fall Seminar you will receive a \$25.00 discount, which includes our membership rebate, by using the promotional code you received in an e-mail. For those who did not attend the Fall Seminar you can receive a \$10.00 discount by using the published promotional code.

In these challenging economic times, we count on our Members to support our Chapter by attending Chapter Seminars and Dinner Meetings. Please sign up for this vital education.

As your new President, I am not only asking you to support our Chapter, I am asking you to communicate your ideas, thoughts, complaints, and any comments you would like to me directly at: dsmaurer@sbcglobal.net. I am committed to working together with our Members to continue building a chapter you can be proud of and a chapter you want to participate in.

As a final note, please be aware of the Change of Date for the January Dinner Meeting. The meeting will be held on January 14, 2010.

I wish you all a happy, healthy and prosperous 2010.

EA TEAMS:

Redwood City Group:

Will meet Friday, **January 22nd 2009 at 8:00 am**
At King & Associates: 820 American Street, San Carlos
Parking available in front of office.

Refreshments: **Dave King**

Call Amanda (Southward) Boston, EA for more info:
650 591-9661.

All Members welcome. No agenda. Get your tax questions answered. Network with other EAs.

San Francisco Group:

Will meet Friday, **January 15th, 2008 at 8:00 am** at
Boulevard Café, 2 Poncetta Drive, Daly City

Call Rico Delodovici, EA for more information: 650-755-3727

All Members welcome. No agenda. Get your tax questions answered. Network with other EAs.

Calendar of Events

Mark your Calendars

January 2010

- | | | | |
|----|----------------------------|---------|--------------------------|
| 14 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
| | (Note Date Change) | | |
| 15 | San Francisco Team Meeting | 8:00 am | <input type="checkbox"/> |
| 22 | Redwood City Team Meeting | 8:00 am | <input type="checkbox"/> |
| | (Note Date Change) | | |
| 28 | Half day Seminar | TBA | |

February 2010

- | | | | |
|----|----------------------------|---------|--------------------------|
| 4 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
| 12 | Redwood City Team Meeting | 8:00 am | <input type="checkbox"/> |
| 19 | San Francisco Team Meeting | 8:00 am | <input type="checkbox"/> |

March 2010

- | | | | |
|----|----------------------------|---------|--------------------------|
| 4 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
| 12 | Redwood City Team Meeting | 8:00 am | <input type="checkbox"/> |
| 19 | San Francisco Team Meeting | 8:00 am | <input type="checkbox"/> |

April, 2009

No Meeting

- | | | | |
|----|----------------------------|---------|--------------------------|
| 9 | Redwood City Team Meeting | 8:00 am | <input type="checkbox"/> |
| 16 | San Francisco Team Meeting | 8:00 am | <input type="checkbox"/> |

May 2010

- | | | | |
|----|----------------------------|---------|--------------------------|
| 6 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
| 14 | Redwood City Team Meeting | 8:30 am | <input type="checkbox"/> |
| 21 | San Francisco Team Meeting | 8:00 am | <input type="checkbox"/> |

June 2010

- | | | | |
|----|--------------------------------------|---------|--------------------------|
| 10 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
| 14 | Practitioners Representative Seminar | Day 1 | <input type="checkbox"/> |
| 15 | Practitioners Representative Seminar | Day 2 | <input type="checkbox"/> |
| 18 | Redwood City Team Meeting | 8:30 am | <input type="checkbox"/> |
| 18 | San Francisco Team Meeting | 8:00 am | <input type="checkbox"/> |

July 2010

- | | | | |
|----|----------------------------|---------|--------------------------|
| 8 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
| 16 | Redwood City Team Meeting | 8:30 am | <input type="checkbox"/> |
| 16 | San Francisco Team Meeting | 8:00 am | <input type="checkbox"/> |

August 2010

- | | | | |
|----|--------------------------------------|---------|--------------------------|
| 5 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
| 13 | Technology Seminar with Bob Jennings | | <input type="checkbox"/> |
| 20 | Redwood City Team Meeting | 8:30 am | <input type="checkbox"/> |
| 20 | San Francisco Team Meeting | 8:00 am | <input type="checkbox"/> |

September 2010

- | | | | |
|---|-------------------------|---------|--------------------------|
| 2 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
|---|-------------------------|---------|--------------------------|

October 2010

- | | | | |
|---|-------------------------|---------|--------------------------|
| 7 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
|---|-------------------------|---------|--------------------------|

November 2010

- | | | | |
|------------|--|---------|--------------------------|
| 4 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
| 10, 11, 12 | CPE by the Bay
Fall Seminar | | <input type="checkbox"/> |

EMPLOYMENT EXCHANGE BANK

<http://goldengateea.blogspot.com>

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***It is the responsibility of advertisers to renew ads monthly. Ads not renewed will not be reprinted.
For more information or to place an ad, contact:***

Dalia Wood, CFP, EA 1920 Alden Street, Belmont, CA 94002 dalia@daliawood.com Phone: 650-520-5601

Upcoming Golden Gate Seminars

- Thursday, **January 28, 2010**: One-half day "Tax Season kickoff."
Speakers: Claudia Hill and Karen Brosi. 8:00 AM to 12 Noon. Watch your email for topic detail.
- Monday, **June 14** and Tuesday, **June 15**, Practitioners Representative Seminar;
two tracks (intermediate and advance) Watch you email for details.
- **August 13, 2010** Technology Seminar with Bob Jennings.
- Wednesday, Thursday and Friday, **November 10, 11, and 12, 2010**
CPE by the BAY "Fall Seminar" Providing Quality speakers with their latest topics. Watch you email for details.

MEMBERSHIP CORNER

Don't you want to be where
"Everybody knows your name"?

Wearing a Golden Gate Chapter personalized name badge ensures everybody *does* know your name! Order one today by contacting: Diane Harding, EA at 650-325-9362, mharding@alumni.stanford.org or just tell Members at the check in desk of our monthly dinner meeting.

If you hear of any Members under the weather, please contact **Jeanne Gerritsen, EA** 650-995-9903 or jgerritsen@jps.net so that the appropriate memento can be sent.



Budget Request

The Finance & Budget Committee requests that all Chapter committee chairs, chapter officers and directors requiring a budget for Fiscal Year 7/2010 to 6/2011 submit their request for budget to Pam Blair, EA prior to **April 20, 2010**.

Please remember that even if you are not going to be serving on the committee that you currently chair next year, unless you budget now, the committee will not have a budget for next fiscal year





IRS Information Regarding Preparer Penalties

(click on the link for the full text of the Revenue Rulings)

Revenue Ruling 2010-04 provides guidance on whether a tax return preparer is liable for criminal and civil penalties under Internal Revenue Code sections 7216 and 6713 when the tax return preparer uses tax return information to contact taxpayers to inform them of changes in tax law that could affect the taxpayers' income tax liability reported in tax returns previously prepared or processed by the tax return preparer; uses tax return information to determine which taxpayers' future income tax return filing obligations may be affected by a prospective change in tax rule or regulation and to contact such taxpayers to notify them of the changed rule or regulation, explain how the change may affect them, and advise them with regard to actions they may take in response to the change; or discloses tax return information contained in the list permitted to be maintained by the tax return preparer under section 301.7216-2(n) to a third-party service provider that creates, publishes, or distributes, by mail or e-mail, tax information and general business and economic information or analysis for educational purposes or for purposes of soliciting additional tax return preparation services for the tax return preparer, for the purpose of obtaining the 'newsletter' creation, publication, and or distribution services offered by the third-party service provider.

Revenue Ruling 2010-05 provides guidance on whether a tax return preparer is liable for criminal and civil penalties under Internal Revenue Code sections 7216 and 6713 when the tax return preparer discloses (1) to a professional liability insurance carrier tax return information required by the insurance carrier to obtain or maintain professional liability insurance coverage; (2) to a professional liability insurance carrier tax return information required by the insurance carrier to promptly and accurately report a claim or a potential claim against the tax return preparer, or to aid in the investigation of a claim or potential claim against the tax return preparer; (3) to a professional liability insurance carrier tax return information to the preparer's professional liability insurance carrier in order to obtain legal representation under the terms of the insurance policy; or (4) tax return information to an unrelated attorney for the purpose of evaluating a claim or potential claim against the tax return preparer.

Board of Directors

President

Denis Maurer, EA
415-850-1391
dsmaurer@sbcglobal.net

Vice President

Glenn Carlson, EA
415-519-1728
Carlson1040@sbcglobal.net

Secretary

Lydia Mazer, EA
650-593-1401
lydiamazer@yahoo.com

Treasurer

Michael G. Huff, EA
415-239-4400
huff94@sbcglobal.net

Immediate Past President

Liz Stettiner, EA
650-854-4627
lzstea@comcast.net

CSEA Director

Liz Stettiner, EA
650-854-4627
lzstea@comcast.net

Directors to June 2010

Frank Tom, EA
415-425-3834
fntom88@msn.com

Bruce Lacina, EA
650-369-7472
bruce@brucelacina.com

Directors to June 2011

Dennis Fullalove, EA
650-583-6087 x203
djf@sfaea.com

Amanda Boston, EA
650-591-9661
amanda@southwardtax.com

Ellis Hsu-Mastromonaco, EA
415-333-3756
ehmastro@sbcglobal.net

Committees

Administrative Review
Norman M. Golden, EA

Awards
Norman M. Golden, EA

Bylaws

Jeff Savitz, EA

Education

Fall Update. Seminar

Bob Kern, EA

1-Day Seminar

TBD

Monthly Program

Don Gundry, EA

Enrollment Exam

Norman M. Golden, EA

Don Gundry, EA

CPE Reporting

Lydia Mazer, EA

Education Marketing

Jeff Savitz, EA

Education R&D

Lydia Mazer, EA

Employment Bank

Dalia Wood, CFP, EA

Examination

Midge Schmidt, EA, CPA

Finance & Budget

Pam Blair, EA

Historical

Rico Delodovici, EA

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Liz Stettiner, EA

Dennis Fullalove, EA

Member Benevolence

Jeanne Gerritsen, EA

Membership

Midge Schmidt, EA, CPA

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Amanda Boston, EA

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Jeff Savitz, EA

Public Disaster

Verna Wallace, EA

Public Information & Awareness

Denis Maurer, EA

Quickfinders

Dennis Fullalove, EA

Scholarship

Lydia Mazer, EA

Strategic Planning

Glenn Carlson, EA

Student Education Outreach

James Southward, EA

Tax Agency Liaison

Liz Stettiner, EA

Technology

Norman M. Golden, EA