



Golden Gate Chapter Newsletter

California Society of Enrolled Agents

January 2009

www.ggcea.org

Monthly Chapter Meeting

Thursday January 15, 2009

(Please note date change)

“What you need to know about Form 571L”

Presented by

Bob Innes

Mr. Innes is from the San Mateo County Assessors Office. Mr. Innes is a Principle Auditor- Appraiser for the County, and has been with the Assessors Office of San Mateo County for over 28 years. Sixteen of those years he has managed a team of auditors responsible for business tax audits as well as the audits of major corporations doing business in the County. Don't miss this very special opportunity to get your questions answered by *the* expert.

“What you need to know about Form 571L”

The tax industries most well kept secret is now revealed. Discover how you can benefit your client utilizing the knowledge acquired.

- Learn how to solve the mystery of the form 571L
- Understand how to properly prepare the form 571L
- Find out when your client is required to file form 571L
- Learn what the due date is for filing
- Learn if there are penalties for late filing
- Discover if an extensions of time to file is available
- Learn about what constitutes taxable business property
- Learn what equipment is not taxable business property
- Find out who you can call when you run into trouble

Grosvenor Airport Inn

380 South Airport Blvd., South San Francisco

4:30 pm Board Meeting - All Members Are Welcome

6:00 pm Social/Networking

6:30 pm Dinner

7:30 pm Continuing Education

Dinner: Chicken a la Grosvenor Vegetarian: Cannelloni

Dessert: Tiramisu

No Host Bar & No Host Wine

*Make your required dinner reservation by **Midnight, Monday, January 12, 2009.***

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.

President's Message By Liz Stettiner, EA



We hope that 2008 was rewarding for all; in business and in your personal lives. During 2008, our Chapter has gained new Members (a pleasant situation) and unfortunately lost a few Members to the ravages of time. May we remember those who have passed. However, on an upbeat note, welcome to 2009. The new challenges we face as Professional Business Men and Women are many and varied. Let me enumerate just a few, as they occur to me. Members, protect and advance your business during the current economic downturn. I reiterate and classify what has undoubtedly already crossed your minds.

- ◆ Reduce expenses. Easy to say but hard to do. Reduce two page letters to one page to conserve paper. Trivial, but a worthwhile mental exercise.
- ◆ Send FedExes two-day rather than overnight.
- ◆ Use Priority Mail where you can.
- ◆ Invoice quicker. If you've been dating and sending invoices on the 30th, why not move them up to the 25th.
- ◆ Pursue more aggressively any delinquent accounts. Slow-pay and no-pay clients should be confronted. Phone calls to deadbeats should be polite but firm. If necessary, cut your losses.
- ◆ To those Members who've already been getting paid in advance for your work, congratulations on your foresight and mental toughness. You've probably lit a beacon for us all to follow.
- ◆ Most of us do not need large fee increases – we just need to charge for the time we spend.
- ◆ Remember Community Service is an excellent source of advertising.
- ◆ Remember to pass the same thoughts to your clients.

Quickfinder Pickup

The Quickfinders will be available at the January Dinner meeting for pick up at the back table.

Newsletter Info?

Due: The 10th of each month.

To: Amanda (Southward) Boston, EA
amanda@southwardtax.com

Calendar of Events

☑ Mark your Calendars ☑

January 2009

- 15 Monthly Chapter Meeting 6:00 pm ☐
(Note Date Change)
16 Redwood City Team Meeting 8:00 am ☐
(Note Date Change)
16 San Francisco Team Meeting 8:00 am ☐
29 Tax Season Kick Off Semiar 8:20 am ☐

Karen Brosi, EA, CFP & Claudia Hill, EA

February 2009

- 5 Monthly Chapter Meeting 6:00 pm ☐

March 2009

- 5 Monthly Chapter Meeting 6:00 pm ☐

April 2009

No Chapter Meeting

May 2009

- 7 Monthly Chapter Meeting 6:00 pm ☐

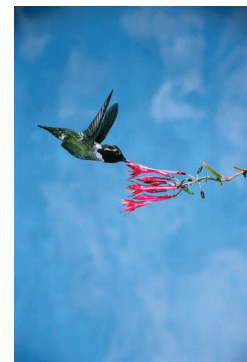
June 2009

- 4 Monthly Chapter Meeting 6:00 pm ☐
Election of Officers and Board of Directors

July 2009

- 9 Monthly Chapter Meeting 6:00 pm ☐

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.



EA TEAMS:

Redwood City Group:

Will meet Friday, **January 16th 2008 at 8:00 am**
At King & Associates: 820 American Street, San Carlos
Parking available in front of office.
Refreshments: **Pam Blair, EA**
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 16th, 2008 at 8:00 am**

Call Rico Delodovici, EA for more information: 650-755-3727
All Members welcome. No agenda. Get your tax questions answered. Network with other EAs.

A HAPPY NEW YEAR

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 650-325-9362 mharding@alumni.stanford.org

or just tell Members at the check in desk of our monthly dinner meeting.

VOICE YOUR CONCERNS TO THE IRS!

The Practitioner Panel will be meeting this November or January of next year.

As a Chapter Member benefit, here is your opportunity to voice your concerns about problems you've encountered in dealing with the IRS. Please send me a description of the problem, what action you have taken, if any, in trying to resolve the issue. The purpose of the panel is to identify systemic problems not to resolve specific case issues. Therefore, if you've encountered systemic problems on an ongoing basis, please let me know.

The panel consists of approximately 15 individuals, including IRS personnel and members representing the practitioner community; attorneys, CPA's, EA's, and academia. This relatively small group brainstorms about ongoing concerns and systemic problems that have been encountered when dealing with the IRS. If there is a significant problem the issue is elevated for possible resolution. Feedback is provided by the IRS upon resolution, or the process that is required to resolve the problem

Jeff Savitz, EA (jeffsavitz@usa.net)

Tax Season Kickoff Seminar

Karen Brosi, EA, CFP & Claudia Hill, EA

January 29 8:20 to 12:00 Noon

Location: Crowne Plaza Foster City

For more information please visit www.ggcea.org/Events



Ann Wieseltier, EA

It is with great sadness that I announce the loss of a valued Member of our Chapter. Ann Wieseltier, EA passed away December 31, 2008. She will be greatly missed by our Chapter, colleagues, friends and family. Ann devoted much time to the Chapter in various committees over the years. She served as the Chapter's Monthly Education chair for 10 years and was influential in creating the employee exchange bank as well as the San Francisco Team meeting.

There will be no services. Donations may be made to the SPCA, the Magic Theater or a charity of your choice.

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Editor, Golden Gate Chapter Newsletter

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Jeff Savitz, EA
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Jeff Savitz, EA

Directors to 6/30/2010

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**Golden Gate
Committees**

Practice Mgmt

Phil Stelling, EA, PE

**Tax Agency Liaison &
Legislative**

Don Gundry, EA

Finance & Budget

Pam Blair, EA

Membership

Midge Schmidt, EA, CPA

**Public Information
& Awareness**

Denis Maurer, EA

Education

Fall Update. Seminar

Bob Kern, EA

Mini Seminar

Gordon Dito, EA

1-Day Seminar

Dennis Fullalove, EA

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

Dinner Raffle

Burt Ramirez, EA

Scholarship

Jean Southward, EA

Quickfinders

Dennis Fullalove, EA

Audit

Midge Schmidt, EA, CPA

Historical

Pauline Yetter, EA

Hospitality/ House & Site

Claudia Fisher, EA

Dennis Fullalove, EA

Newsletter Editor

Amanda (Southward) Boston, EA

Technology

Norman M. Golden, EA

Public Disaster

Verna Wallace, EA

Member Benevolence

Jeanne Gerritsen, EA

Employment Bank

Ann Wieseltier, EA

Bylaws

Jeff Savitz, EA

Admin Review

Norman M. Golden, EA

Student Outreach

James Southward, EA (temp)

Awards

Norman M. Golden, EA

Nominating

Norman M. Golden, EA

Strategic Planning

James Southward, EA