



# Golden Gate Chapter Newsletter

California Society of Enrolled Agents

May 2010

[www.ggcea.org](http://www.ggcea.org)

## Monthly Chapter Meeting

**Thursday May 6, 2010**

**The Golden Gate Chapter proudly presents:**

# **Kyle C. Martin**

**Supervisory Attorney**

**Estate & Gift Tax**

**Internal Revenue Service**

Kyle is a Supervisory Estate Tax Attorney with the Internal Revenue Service in Oakland, California. He has been with the Service since 1989 and in his current position since March of 2006.

Kyle is a graduate of the University of Kansas with a Bachelor of Arts degree in Psychology. In 1993, Kyle received his Doctor of Jurisprudence degree from San Francisco Law School. He has been a member of the California State Bar since December of 1993.

As the Supervisory Attorney, Kyle manages 11 attorneys in the Oakland office. Before obtaining his current position, Kyle was an Estate Tax Attorney in San Francisco and Oakland from 1994 to 2006.

## **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: Chicken Wellington Vegetarian: Stuffed Acorn Squash**

**Dessert: Flan**

**No Host Bar & No Host Wine**

*Make your required dinner reservation by **Midnight, Monday, May 3, 2010.***

**Register at [www.ggcea.org](http://www.ggcea.org)**

Please make your reservations as early as possible. We would appreciate credit card payments. Cash & Checks can be delivered at the door. If you miss a meeting your payment will be carried forward to the next meeting once.

**New Prices - due to increased costs, beginning with the February 2010 meeting**

**Attendees with reservations - \$40 Attendees without a reservation - \$45**

## ***President's Message***

### ***By Denis Maurer, EA***

*I hope everyone had a rewarding tax season and I am sure you are relieved that it is over.*

*As I sat down to relax after tax season, I started to read the California Enrolled Agents magazine. This is when I realized I only had a couple of days to submit why the Golden Gate Chapter should be Chapter of the Year in CSEA. My relaxation was over and it was back to work.*

*When I completed my first draft for Chapter of the Year, I realized I had the President's message to write. Oh no, now what will I say. That's when I thought I should share some of this year's accomplishments and our Members can appreciate why we are the Chapter of the Year, whether we win an award or not.*

*Our Membership Committee, led by Midge Schmidt, EA has done an outstanding job. They have enlisted 3 new Members, 15 Professional Associates, and 2 Student Associates to our Chapter. The attendance at dinner/education meetings has increased and more Members are participating in Chapter committees and on the Board of Directors.*

*Our Dinner Education, headed by Don Gundry, EA has been excellent, relevant and interesting. I know not everyone comes for the food, so I have to believe it is the friendship, discussions, and education.*

*Our Education Committee, headed by Bob Kern, EA has done an outstanding job for the past 25 years and this year is no exception. We have a new West Coast Representation Seminar June 14-15. This seminar will help you develop the skills needed and to "discover what representation can do for your practice". There is still room left, please support this seminar.*

*We have included new people on our Board of Directors. This is extremely important for our Chapter to grow and renew. It is important to have new ideas and contributions. I would like to thank Glenn Carlson, EA and Bruce Lacina, EA for a job well done.*

*The Redwood City and San Francisco Team meetings are doing well and being well attended. These are informal breakfast meetings where you are able to discuss any problems, tax or practice management issues. I think everyone would profit by attending, check our calendar for dates.*

*Our work with students at College of San Mateo continues. Teaching and assisting students to pass their SEE exams, or attending the Networking or Career nights and informing people on "What is an Enrolled Agent" and that there are job opportunities in the field of Taxation. Thank you to the teachers, Norman Golden, EA and Don Gundry, EA and to Lydia Mazer, EA for making sure all of our education credits are recorded. Jim Southward is working with NAEA to institute a certificate program in taxation in Community Colleges nationwide comparable to the College of San Mateo.*

*The Golden Gate Chapter's Outreach Community was a success this year. The Committee collected and donated needed items this Holiday Season as in past Holiday Seasons to Laguna Honda Hospital. Our membership donations were plentiful and happily received by the administrators and patients at the hospital.*

*Several Members participated in "Channel 7 On Your Side", two day call in program fielding questions from the public needing help with their tax returns. Norman Golden, EA and Don Ellison, EA were interviewed as Enrolled Agents and appeared on ABC TV Six O'clock news.*

*The Golden Gate Chapter organized an Enrolled Agents outing to the Giant vs. Dodger game last season and is doing so again this season. We were welcomed on the stadium scoreboard as "CA Society of Enrolled Agents, The Tax Professionals".*

*The Public Information and Awareness Committee has completed two advertising campaigns focused on informing people about Enrolled Agents. The first in 2009 placed posters on the side of San Francisco Buses and Trains. The posters stated "If you Pay Taxes call an Enrolled Agent" and provided the CSEA telephone number for finding an Enrolled Agent. This year's posters were prominently displayed in Bart Stations informing people if they wanted to Save Taxes call and Enrolled Agent and provided the CSEA number for finding an Enrolled Agent.*

*I would like to thank all of Members for participating in Chapter Seminars, Dinner/Education Meetings, Events and Committees. You are what makes our Chapter, "The Chapter of the Year".*

# Upcoming Golden Gate Seminars

- Monday, **June 14** and Tuesday, **June 15**, Practitioners Representative Seminar; two tracks (intermediate and advance) Watch your 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 your email for details.



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.

## 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](mailto:mharding@alumni.stanford.org) or just tell Members at the check in desk of our monthly dinner meeting.

## EA TEAMS:

### **Redwood City Group:**

Will meet Friday, **May 12th 2010** at **8:30 am**  
At King & Associates: 820 American Street, San Carlos  
Parking available in front of office.

Refreshments:

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, **May 19th, 2010** 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

### 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 | <b>CPE by the Bay</b><br><b>Fall Seminar</b> |         | <input type="checkbox"/> |

## Newsletter Info?

**Due: The 10th of each month.**

**To: Amanda (Southward) Boston, EA**  
[amanda@southwardtax.com](mailto:amanda@southwardtax.com)



# EMPLOYMENT EXCHANGE BANK

<http://goldengateea.blogspot.com>

**CONSIDERATION REQUESTED OF ADVERTISERS:**

*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](mailto:dalia@daliawood.com)  
Phone: 650-520-5601

*President:*

**Denis Maurer, EA**  
415-850-1391  
[dsmaurer@sbcglobal.net](mailto:dsmaurer@sbcglobal.net)

*Vice President:*

**Glenn Carlson, EA**  
415-519-1728  
[Carlson1040@sbcglobal.net](mailto:Carlson1040@sbcglobal.net)

*Secretary:*

**Lydia Mazer, EA**  
650 593-1401  
[lydiamazer@yahoo.com](mailto:lydiamazer@yahoo.com)

*Treasurer:*

**Michael G. Huff, EA**  
415 239-4400  
[huff94@sbcglobal.net](mailto:huff94@sbcglobal.net)

*Immediate Past President:*

**Liz Stettiner, EA**  
650 854-4627  
[lzstea@comcast.net](mailto:lzstea@comcast.net)

*CSEA Directors:*

**Liz Stettiner, EA**  
650 854-4627  
[lzstea@comcast.net](mailto:lzstea@comcast.net)

*Directors to 6/30/2010*

**Frank Tom, EA**  
415-425-3834  
[fmtom88@msn.com](mailto:fmtom88@msn.com)

**Bruce Lacina, EA**  
650-369-7472  
[bruce@brucelacina.com](mailto:bruce@brucelacina.com)

*Directors to 6/30/2011*

**Dennis Fullalove, EA**  
650-583-6087 x203  
[djf@sfaea.com](mailto:djf@sfaea.com)

**Amanda Boston, EA**  
650-591-9661  
[amanda@southwardtax.com](mailto:amanda@southwardtax.com)

**Ellis Hsu-Mastromonaco, EA**  
415-333-3756  
[ehmastro@sbcglobal.net](mailto:ehmastro@sbcglobal.net)

## Golden Gate Committees

**Practice Mgmt**  
Phil Stelling, EA, PE

**Tax Agency Liaison & Legislative**  
Liz Stettiner, EA

**Team Meetings**  
**Redwood City Team**  
Amanda Boston, EA  
**San Francisco Team**  
Rico Delodovici, EA

**Nominating**  
Jeff Savitz, EA

**Strategic Planning**  
Denis Maurer, EA

**Finance & Budget**  
Pam Blair, EA

**Examination**  
Midge Schmidt, EA

**Membership**  
Midge Schmidt, EA, CPA

**Public Information & Awareness**  
Denis Maurer, 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

**Fundraising**  
TBD

**Auctions**  
TBD

**Scholarship**  
Lydia Mazer, EA

**Quickfinders**  
Dennis Fullalove, EA

**Audit**  
Midge Schmidt, EA, CPA

**Historical**  
Rico Delodovici, EA

**Hospitality/ House & Site**  
Liz Stettiner, EA  
Dennis Fullalove, EA

**Newsletter Editor**  
Amanda Boston, EA

**Technology**  
Norman M. Golden, EA

**Public Disaster**  
Verna Wallace, EA

**Member Benevolence**  
Jeanne Gerritsen, EA

**Employment Bank**  
Dalia Wood, CFP, EA

**Bylaws**  
Jeff Savitz, EA

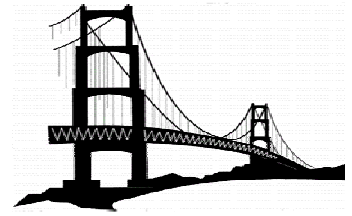
**Admin Review**  
Norman M. Golden, EA

**Student Outreach**  
James Southward, EA

**Awards**  
Norman M. Golden, EA



Golden Gate Chapter  
California Society of Enrolled Agents



Nominating Committee Report

<b>Name</b>	<b>Office</b>	<b>Term</b>
Denis Maurer, EA	President	2010/2011
Glenn Carlson, EA	Vice President	2010/2011
Lydia Mazer, EA	Secretary	2010/2011
Michael Huff, EA	Treasurer	2010/2011
Gordon Dito, EA	Director	2010/2012
Don Ellison, EA	Director	2010/2012
Bruce Lacina, EA	Director	2010/2012
Michael Huff, EA	CSEA Director	2010/2011

All Chapter Members are invited and encouraged to attend the Chapter's Annual Membership Meeting and elect the new officers and directors on Thursday evening, June 10, 2010 at the Grosvenor Hotel, South San Francisco.

Jeff Savitz, EA – Committee Chair