



Golden Gate Chapter Newsletter

California Society of Enrolled Agents

July 2010

www.ggcea.org

Monthly Chapter Meeting

Thursday July 8, 2010

The Golden Gate Chapter proudly presents:

LORI SILVER, ESQ, CPA, LLM

BUDGETING FOR TOUGH TIMES

- *. Discover the basic of her budget approach to saving money
- *. Learn how a budget tool could save your client money
- *. How this budget approach can help your client
- *. Learn how to teach your clients the budgeting system
- *. Discover another marketing benefit for your practice

Lori Silver is an attorney, CPA and LL.M. in taxation with a private law practice limited to estate planning, tax matters and acting as a professional trustee. She is a frequent speaker on issues related to estate planning and taxation. She has been actively involved with the State Bar of California and has served on the Executive Committee of the Tax Section. Lori has served on an IRS Win-Win Task Force identifying and solving systemic problems at the IRS. In the past, she has worked for U.S. Senator John Heinz, Congressman John Rousselot, and California Supreme Court Justice William Clark. She has also worked for two "Big Six" accounting firms.

She has served on several non-profit Boards, including the National Steinbeck Center, Natividad Foundation, Monterey College of Law, Professional Women's Network, Congregation Beth Israel, Upjohn Foundation, and Adopt International, among others. Lori is married and has two children.

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 al la Grosvenor** Vegetarian: **Grilled Fresh Vegetables**

Dessert: **Vanilla Ice Cream**

No Host Bar & No Host Wine

*Make your required dinner reservation by **Midnight, Monday, July 5, 2010.***

Register at 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.

Dinner Policy: Members **with** a Reservation - \$40.00; other attendees **without** a Reservation and nonmembers - \$45.00.

You must cancel your reservation if you cannot attend, otherwise, you will be billed for the amount of the dinner.

President's Message

By Denis Maurer, EA

For the times they are a-changin' - Bob Dylan

As I reflect over the past month, I would say truer words were never spoken as it pertains to Enrolled Agents and the Tax Preparation Industry.

First I would like to welcome our Chapter's new Directors; Gordon Dito, EA and Don Ellison, EA. I would also like to congratulate Jean Nelsen, EA, Past President of the Golden Gate Chapter, who was elected First Vice President of CSEA. As a Member of CSEA you are always welcome to attend all Board Meetings as guests, voice your opinion or participate by being on a committee either at the Chapter level or the State level. Golden Gate Members have always had a strong presence of participation at the State level and you will be welcomed to contribute.

At CSEA's Annual Meeting, NAEA President, Gina Jones, EA, relayed the message to the members attending, that the IRS may be giving us an opportunity to change our title from Enrolled Agent to another title. NAEA has sent out a survey to all members requesting you to make your choice as to what title you would like us to use, if it is not Enrolled Agents. I would urge you to respond to this survey. This opportunity has developed because of the upcoming inclusion of all preparers of tax returns to be governed under Circular 230. Ms. Karen Hawkins, EA, Director of Professional Responsibility for the IRS, and the Keynote Speaker at our Representation seminar, has stated that there will be numerous changes coming to our industry in the coming years, the first being that all persons who prepare taxes will be governed by Circular 230. We will also have to apply for new PTIN numbers in the near future.

There are now approximately 40,000 Enrolled Agents worldwide, but soon the number of people governed by Circular 230, will grow to well over one million. The inclusion of all tax preparers under Circular 230 presents a wonderful opportunity for NAEA/CSEA and for our Chapter, to bring these preparers into our organization as Professional Associates, with the hope they will sit for the SEE Exam, become Enrolled Agents and develop into full members of the Golden Gate Chapter, CSEA and NAEA. There is certainly strength in numbers.

As you are also aware with the new laws that have been enacted with the Patient Protection and Affordable Care, the Health Reconciliation, HIRE, and other Acts, we will have a great deal of work to do to keep abreast of the current changes. Fortunately, our Chapter will address these changes in our Fall Update Seminar, November 11-13, 2010. We also have an upcoming Technology Seminar, August 13th, to keep you abreast of the every changing world of Technology.

(Continued above right)

The Golden Gate Chapter has also just completed the redesign of our Website. You probably had to go there to receive this email, check it out, tell us what you think, your opinion is very important to me and this Chapter.

Your Board of Directors and many of our Committee chairpersons will have completed our Strategic Planning Meeting by the time you are reading this message. But that doesn't mean if you have a suggestion, it is too late to voice it. Our planning will hopefully set a course for us to follow in the upcoming three to five years. We recently sent out a short survey to ask our members their thoughts on a few selected questions. This is your Chapter you have a say in what we do and how we do it, please voice your opinion.

I have one bit of happy and sad news. The sad news; Ms. Cathy Apker, CAE Executive Vice President of CSEA, will retire in the upcoming year. Ms. Apker, CAE has been exceptionally helpful to all Members and Chapters in California and a wonderful resource to have had. She will be missed. The happy news, she and her husband will have the opportunity to enjoy their retirement together. We wish her the all the best and a very enjoyable retirement.

Calendar of Events

Mark your Calendars

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

- | | | | |
|---|-------------------------|---------|--------------------------|
| 9 | 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"/> |
| 11 | Fall Seminar Day 1 | | <input type="checkbox"/> |
| 12 | Fall Seminar Day 2 | Federal Updates | <input type="checkbox"/> |
| 13 | Fall Seminar Day 3 | Ethics | <input type="checkbox"/> |

December 2010

- | | | | |
|----|----------------------------|---------|--------------------------|
| 2 | Monthly Chapter Meeting | 6:00 pm | <input type="checkbox"/> |
| 10 | Redwood City Team Meeting | 8:30 am | <input type="checkbox"/> |
| 10 | San Francisco Team Meeting | 8:00 am | <input type="checkbox"/> |

OUR BOARD IN ACTION

The final 2009-2010 Board of Directors meeting was held on June 10, 2010. President Maurer thanked the Board for its work during the year. Director Frank Tom's term ended with this meeting. His insights were incisive and helpful to the Board and its committees. Highlights of the board meeting:

Information related to the upcoming representation seminar was presented. A reminder that nominations for Chapter Member of the Year and Hall of Fame are due to the Awards Committee by June 30th. The Board entertained and passed a motion accepting the 2010-2011 budget as received from the Finance and Budget Committee. The Board was informed that the new Chapter website is up and running. The President will inform the membership of this fact and invite them to visit.

The next Board of Directors meeting will be held on Thursday July 8th at 4:30 p.m. All Chapter Members are welcome.

NAEA NAME CHANGE SURVEY

With the upcoming registration of tax preparers not currently regulated by Circular 230 (Enrolled Agents, CPAs and attorneys) there is a possibility that the Internal Revenue Service may consider changing the name of Enrolled Agents. The National Association of Enrolled Agents is conducting a survey. If you have not already completed the NAEA survey, please do so ASAP. This is very important to your future and the future of all EAs.

You can find the survey at:

http://www.magnetmail.net/forms/display_form.cfm?uid=NAEA&fid=24867&rtype=nonmm

Message From the Vice President

I would like to thank everyone who participated in our recent survey of the membership. This survey was used the help set the agenda for the chapter's Strategic Planning Meeting which was held on June 29th. We hope to issue one or two surveys a year so that we can obtain direct feedback from Chapter members on issues important to them. Appended to this newsletter you will find a table presenting some results of the survey. We will be addressing other parts of the survey in upcoming newsletters.

Glenn Carlson, EA
Vice President

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, **July 16th** 2010 at **8:30 am**

At King & Associates: 820 American Street, San Carlos

Parking available in front of office.

Refreshments: **Gene Baisch, 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, **July 16th, 2010** at **8:00 am** at
Boulevard Café, 2 Ponce de Leon 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.

Newsletter Info?

Due: The 10th of each month.

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

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NOW ON OUR WEBSITE - ggcea.org

Part-time / Full-time (Minimum 20 hours a week) long-term employment. Flexible working hours, Entry level - general administration, e.g. filing, answering phone, data input for bookkeeping & tax. Contact: BL Pang, EA at pangcorp@aol.com or (650) 593-7522

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 at dalia@daliawood.com or (650) 520-5601

Upcoming Golden Gate Seminars

- **August 13, 2010** Technology Seminar with Bob Jennings.
- Thursday, Friday & Half Day Sat, **November 11, 12 and 13, 2010**
CPE by the BAY "Fall Seminar" Providing Quality speakers with their latest topics. Watch your email for details or the Chapter website ggcea.org

Know Someone Who Wants to Become an EA?

Classes are at the College of San Mateo

<http://www.collegeofsanmateo.edu/schedule/>

ACTG 176 Enrolled Agent Exam Preparation

Classes are Tuesday nights from 6:00 to 9:00 starting August 24

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.

BASEBALL

President Denis Maurer has 3 tickets available for the Chapter's Day at AT&T Park Giants vs. Dodgers game at 1:00 p.m. on Sunday August 1st. Contact him ASAP if you are interested. dsmaurer@sbcglobal.net



CSEA Annual Meeting Reimbursement Allowance: The Chapter is to allocate \$2,500 not to exceed \$250/person, when available, to provide an allowance to Members attending all business sessions and CSEA Caucus (if any), provided the Member has attended 2/3 of the annual 11 Chapter meetings. Officers, directors and Committee Chairs of CSEA & NAEA who are unable to attend Chapter meetings due to Society business receive credit for Chapter Attendance. (BM 6/5/97)

NAEA Annual Meeting Reimbursement Allowance: The Chapter is to allocate funds, when available to provide an allowance to Members attending all business meetings and the Caucus, if any, of the NAEA Annual Meeting provided the Member has attended at least 2/3 of the prior twelve-month Chapter meetings. Officers, Directors & Committee Chairs of CSEA & NAEA who are unable to attend Chapter meetings due to Society business receive credit for Chapter attendance. (BM 7/10/97) For the 2009 year the reimbursement amount has been set at \$1,500 not to exceed \$150/person.

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Dolden 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

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

GGCEA Strategic Planning Survey

Please rank the following activities in the order (1 through 5) which you feel the Golden Gate Chapter should prioritize them over the next two years (1 = highest priority; 5 = lowest priority):

	1	2	3	4	5	Rating Average	Response Count
Member Education	57.0% (45)	19.0% (15)	12.7% (10)	3.8% (3)	7.6% (6)	1.86	79
Bringing In New Members/Mentoring	15.2% (12)	27.8% (22)	27.8% (22)	21.5% (17)	7.6% (6)	2.78	79
Peer Networking/Expanded Chapter Events (e.g. Giants baseball game)	8.9% (7)	5.1% (4)	13.9% (11)	26.6% (21)	45.6% (36)	3.95	79
Enhance Public Awareness of EA Profession/Community Outreach	16.5% (13)	32.9% (26)	22.8% (18)	19.0% (15)	8.9% (7)	2.71	79
Chapter Support of CSEA/NAEA	2.5% (2)	15.2% (12)	22.8% (18)	29.1% (23)	30.4% (24)	3.70	79
answered question							79
skipped question							3

Michael G. Huff

Enrolled Agent

5317 Mission Street, Suite A

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June 30, 2010

CSEA Director's Report

The annual meeting of the California Society of Enrolled Agents was held on Thursday, June 24th in Rohnert Park, California at the Doubletree Hotel. There was a change in the by-laws approved by the members which limit the terms of CSEA State Directors to a total of eight years with no more than four year in succession. After four years, there must be a two year break in service. The rationale behind this by-laws change is that for years, some of the smaller chapters have been sending the same directors year after year. This change will ensure that there will be new people coming into the Society's governance.

The President of NAEA, Gina Jones, EA, addressed the assembly about various matters. The bombshell was that she, on behalf of NAEA, has been in discussions with Karen Hawkins, Director of the Office of Professional Responsibility regarding the possibility of changing the name of Enrolled Agents. NAEA sent out a survey a few days before the annual meeting asking for input on this issue. They listed approximately 25 possible choices and asked for the members to mark their preferred choice and also which names would be acceptable. Ms. Jones indicated that there was a tremendous response and that the leading candidates thus far are "Certified Tax Professional" and "Certified Tax Practitioner." OPR has indicated that the IRS may unilaterally rename EAs so our input is critical in order to have influence over this matter.

This discussion was carried over to the Board Meeting and engendered spirited debate.

Thursday evening was the Grand Banquet during which CSEA Officers and Directors were installed.

Friday was the Director's Orientation which all nineteen Director's attended. The governance of the Society was discussed as were Parliamentary procedures.

The Board of Directors met Saturday morning at 8 am. After an hour the meeting was adjourned to the committee meetings. Your Director will be working on Legislative Affairs, PAC, and PIA this year. If any of our members have questions or concerns that you wish to have taken to Sacramento, then please let me know.

Sunday morning the Board reconvened at 8 am. Robert Gardiner, EA was awarded the Outstanding Service Award for his many years of service to the Society. A motion was made and passed to institute new award for individual who have demonstrated outstanding service in the area of Public Information and Awareness. Nominations can be made by individuals or by the Chapters.

A new logo was adopted by the Board after months of work in which more than 40 designs were evaluated and discarded. There was quite a bit of discussion as to whether it was prudent to

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adopt a new logo when there is a strong possibility of a name change. It was decided that if there is a name change it would be relatively easy to edit the logo. As soon as copies are available the design will be made available to the membership.

Another item that was discussed was the CSEA website. It is being redesigned and should be finished in the next couple of months.

It was announced that our Executive Vice President, Cathy Apker, CAE will be retiring. I have had the pleasure of working with Ms. Apker over the years and she will be sorely missed. The timing of her resignation is to give the Executive Committee time to conduct the search prior to next tax season.

The San Diego Chapter requested volunteers from anyone attending the IRS Forum in San Diego to help man the CSEA booth. Anyone interested should contact cary@csea.org.

The meeting was adjourned at 11:30 am.

Respectfully submitted,

Michael G. Huff, EA
CSEA Director, Golden Gate Chapter

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