



Golden Gate Chapter Newsletter

California Society of Enrolled Agents

February 2009

www.GGCEA.org

Monthly Chapter Meeting

Thursday February 5, 2009

Recent Changes to CALIFORNIA LAW

You Need to Know!

Presenter Lynn Freer, EA

The premier presenter of California tax information in the country.

- Conformity or non- conformity-- **that** is the question!
- Learn about the changes required for estimated payments beginning in 2009!
- Know when your client needs to make electronic tax payments!
- Discover when your client needs to pay the advanced LLC fees!!
- Hear all the good, the bad, and the ugly about changes from the FTB!!!

Ms. Freer headed her own EA firm in Orange County for many years. A researcher, writer, and speaker, Ms. Freer also owns and operates Spidell Publishing which currently produces the California Tax Newsletter, the Elder Care Planner, and a plethora of tax and business/financial books.

Her expertise is enhanced by her ongoing research and networking with the various tax departments in Sacramento.

She'll present the highlights of California tax law changes for individuals and businesses, as well as the problem areas of non-conformity with the new Federal tax laws.

We promise you an evening full of useful information and timely filing tips. Take a break while you still can; get updated on California issues at the dinner meeting on Thursday, February 5, 2009.

Grosvenor Airport Inn

380 South Airport Blvd., South San Francisco

5:00 pm Board Meeting - All Members Are Welcome

6:00 pm Social/Networking

6:30 pm Dinner

7:30 pm Continuing Education

Dinner: Roast Pork Tenderloin Vegetarian: Pasta & Vegetables with Alfredo Sauce

Dessert: Ice Cream with Strawberry Sauce

No Host Bar & No Host Wine

*Make your required dinner reservation by **Midnight, Monday, February 2, 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



By the time you read this message, you should be into taxes. Remember not only will this year be challenging for us as Enrolled Agents, but our clients will be facing challenges that they have never faced before.

Be optimistic, be cautious, be helpful, and be there – our clients – old and new, need our professionalism.

As the appointments begin to run together and remembering what day and time it is, smile at the client, find the file, and get ready for another 15, 30, 45, or 60 minutes of “ain’t it awful”.

Try to develop some phrases for this situation unique to your practice.

Those of you who are in sole practice, call other EA friends and get/give a lift to your/their spirits. Be aware that we are all facing the same situations daily.

*We are **The Tax Professionals!**
Go get ‘em, tiger.*

Calendar of Events

Mark your Calendars

January 2009

- 29 Tax Season Kick Off Seminar 8:20 am
Karen Brosi, EA, CFP & Claudia Hill, EA

February 2009

- 5 Monthly Chapter Meeting 6:00 pm
California Update
Lynn Freer, EA
- 13 Redwood City Team Meeting 8:00 am
20 San Francisco Team Meeting 8:00 am

March 2009

- 5 Monthly Chapter Meeting 6:00 pm
“Ask the Experts”
Joe Calderaro & Don Schippa
- 13 Redwood City Team Meeting 8:00 am
20 San Francisco Team Meeting 8:00 am

April 2009

No Chapter Meeting

- 10 Redwood City Team Meeting 8:00 am
17 San Francisco Team Meeting 8:00 am

May 2009

- 7 Monthly Chapter Meeting 6:00 pm
8 Redwood City Team Meeting 8:30 am
15 San Francisco Team Meeting 8:00 am

June 2009

- 4 Monthly Chapter Meeting 6:00 pm
Election of Officers & Board of Directors
- 12 Redwood City Team Meeting 8:30 am
19 San Francisco Team Meeting 8:00 am

July 2009

- 9 Monthly Chapter Meeting 6:00 pm
(Note Date Change)
- 10 Redwood City Team Meeting 8:30 am
17 San Francisco Team Meeting 8:00 am

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, **February 13th 2008 at 8:00 am**
At King & Associates: 820 American Street, San Carlos
Parking available in front of office.
Refreshments: **BL Pang, 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, **February 20th, 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.

Newsletter Info?

Due: The 10th of each month.

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

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

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

Budget Call

All committee chairs are requested to submit their Budget Request for the 2009-2010 chapter fiscal year to Pam Blair at pam@cftax.com no later than **April 20, 2009**. The Budget Request should include expected revenue and total budget expenditure for the fiscal year as well as a short narrative as to the purpose of the committee expenses. The purpose should align with the Chapter Strategic Plan.

Current committee chairs are responsible for preparing the budget request for the next fiscal year even if they will not be serving on that committee in the following fiscal year. Please direct any questions or comments to Pam Blair, PFP, EA.

Phone: 650.573.7530

Fax: 866.228.7567

Pam@CFTax.com

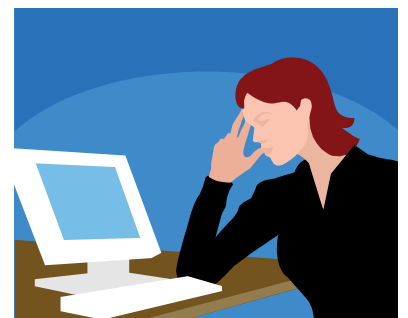
PUT ON YOUR THINKING CAPS!

The March 5th Dinner Meeting program will be

"Ask the Experts"

featuring Joe Calderaro and Don Schippa.

The key to a successful program is measured by the quality of the responses made to your tax questions. In order to give Joe and Don sufficient time to do any necessary research, please begin formulating and sending your questions to Don Gundry either by e-mail (dgundry@aol.com) or by fax (**650/349-9482**). Questions can be taken as late as **March 3, 2009**. As evidenced by the success of our December program, advance questions can lead to useful information for everyone.



EMPLOYMENT EXCHANGE BANK

JANUARY 15, 2009

POSITION AVAILABLE

Established San Francisco office is seeking an experienced **Senior Tax Professional/Manager** with a minimum of 5 years experience. Responsibilities include preparation of individual, corporate, partnership, estate, and trust tax returns using Lacerte Tax Software. Successful candidate should enjoy client interaction, have good communication skills and be proficient in Lacerte. *[Ad #101]*

EA in Oakland seeks part-time help from February 15th to April 15th with possible continuation after April if we work well together. Approximately 6-12 hours (1-2 days) per week, or possibly more if wanted, no dress code. Days/times can be negotiable with possibilities for evenings or weekends. Experience using Lacerte is required. Responsibilities will include tax return preparation and administrative tasks. Some phones, mail processing, filing/copying, document and tax return assembly will also be required. Must have reasonable computer skills including MS Office programs. Must have a good memory, be able to multi-task, prioritize, and have good communications skills. *[Ad #102]*

Redwood City tax office seeks general office clerical / tax return assembly help; full-time temporary position and part-time February through April 15th.

JOB SEEKERS

EA, CPA with MS from Golden Gate University seeks full time position. Experienced in individual, entity, estate and trust returns as well as payroll and sales tax. *[Ad #205]*

CONSIDERATION REQUESTED OF ADVERTISERS:

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For more information or to place an ad, contact:

Julie Chimenti
c/o L. Ann Wieseltier, E.A.
586 Wisconsin Street San Francisco, CA 94107
Julie@taxann.com Phone: (415) 282-7735 Fax: (415) 282-8552

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

