



# Golden Gate Chapter Newsletter

California Society of Enrolled Agents

March 2009

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

**Monthly Chapter Meeting**

**Thursday March 5, 2009**

## Ask the Experts

**Featuring Joe Calderaro & Don Schippa**

**Moderated by Harry Rabin, EA**

Join us for an evening of questions, answers and tax clarity.

On Thursday March 5th, 2009 we will be joined by two of the best problem solvers in the tax business. Don Schippa - President, Tax Research Services of Southfield, MI; Researcher Extraordinaire, and Joe Calderaro - Mr. IRS to Members of the Golden Gate Chapter & of CSEA. Harry Rabin, EA - Our own Mr. Moderator will guide Joe & Don through the maze of questions.

These gentlemen will be present and ready to answer all your tough tax questions as only they can. Be sure to register early for the meeting and get your questions submitted when you register or send them to Don Gundry ([dgundry@aol.com](mailto:dgundry@aol.com)). ALL questions submitted prior to the meeting WILL BE ANSWERED! If there is still time remaining, then questions will be taken from the floor.

### 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: Corned Beef & Cabbage    Vegetarian: Vegetarian Wellington**

**Dessert: Green Ice Cream**

**No Host Bar & No Host Wine**

*Make your required dinner reservation by **Midnight, Monday, March 2, 2009.***

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



*May the Shamrocks cover your path with luck and glory, as you march through life.*

As **The Tax Professionals**, we have many Member benefits available to us through the Golden Gate Chapter, CSEA, and NAEA.

*Do not forget these benefits – use them – they do make life easier. With the new technologies – we receive our answers faster and easier.*

*If you forget which website to use – just Google the topic. The first three or four answers are usually on topic.*

*The Staff at CSEA is a wonderful resource and guide as to where to look.*

*Our own Golden Gate Chapter Members will usually answer emailed help requests as time permits.*

*Remember:*

- You are not alone.
- The California Legislature will make a budget in the next 10 years.
- Smile.
- You are **The Tax Professional**.

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



### Newsletter Info?

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

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

## Calendar of Events

Mark your Calendars

### 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

### EA TEAMS:

#### **Redwood City Group:**

Will meet Friday, **March 13th 2009 at 8:00 am**  
At King & Associates: 820 American Street, San Carlos  
Parking available in front of office.  
Refreshments: **David 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, **March 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.**

## Quickfinder Report 2008

Total Sales: 158 Books

The total projected donation for 2008 is \$790.00 (\$5.00 per item).

2007 sales were 211 and a donation of \$1,073.00

## 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.

## 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](mailto: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](mailto:Pam@CFTax.com)

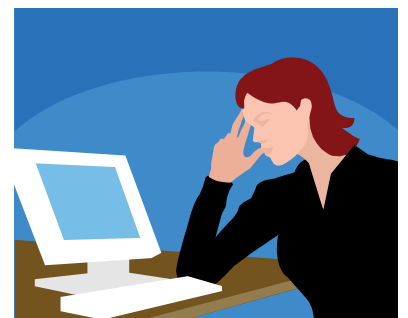
## PUT ON YOUR THINKING CAPS!

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](mailto: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

FEBRUARY 15, 2009

## POSITIONS AVAILABLE

Established San Francisco 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 612 hours (12 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 multitask, prioritize, and have good communications skills.

*[Ad #102]*

Redwood City tax office seeks general office clerical / tax return assembly help; fulltime temporary position and part-time February through April 15th. *[Ad #103]*

## 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]*

Experienced EA, CPA desires part time tax work during tax season and during remainder of 2009 in the San Francisco area. I have worked as a tax preparer and have done tax data entry for the last seven years using proprietary federal and state tax systems, Tax Pro and Lacerte. I have prior experience in senior financial management positions. References and resume are available upon request. *[Ad #206]*

### ***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:***

Julie Chimenti

586 Wisconsin Street  
San Francisco, CA 94107

Julie@taxann.com

Phone: (415) 282-7735

Fax: (415) 282-8552



**Wishing you a  
plentiful and  
stress free  
Tax Season**



*President:*

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

*Vice President:*

**James Southward, EA**  
650 591-9661  
jim@southwardtax.com

*Secretary:*

**Verna Wallace , EA**  
415-239-5333  
vwall39497@aol.com

*Treasurer:*

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

*Immediate Past President:*

**Jeff Savitz, EA**  
650 591-9735  
jeffsavitz@usa.net

*CSEA Directors:*

**Gordon Dito, EA**  
**Jeff Savitz, EA**

*Directors to 6/30/2010*

**Cindy DuChateau, EA**  
650-652-7875  
cindy@bnctax.com  
**Frank Tom, EA**  
415-314-1099  
fmtom88@msn.com

*Directors to 6/30/2009*

**Lydia Mazer, EA**  
650 593-1401  
lydiamazer@yahoo.com  
**Denis Maurer**  
415-850-1391  
dsmaurer@sbcglobal.net  
**Dennis Fullalove, EA**  
650-583-6087 x203  
djf@sfaea.com  
**Colleen Soracco, EA**  
650-794-0901  
thetaxqueen@sbhsi.com

**Golden Gate  
Committees**

**Practice Management**

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

**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**

Bert 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**

Julie Chimenti

**Bylaws**

Jeff Savitz, EA

**Admin Review**

Norman M. Golden, EA

**Student Education Outreach**

James Southward, EA

**Awards**

Norman M. Golden, EA

**Nominating**

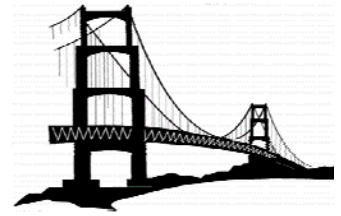
Norman M. Golden, EA

**Strategic Planning**

James Southward, EA



Golden Gate Chapter  
California Society of Enrolled Agents



Nominating Committee Report  
Slate of Candidates  
General Membership Meeting, Elections and Installation  
Thursday, June 4, 2009  
Grosvenor Hotel, South San Francisco

<b>Office</b>	<b>Member</b>
President	James Southward, EA
Vice President	Denis Maurer, EA
Secretary	Lydia Mazer, EA
Treasurer	Mike Huff, EA
Chapter Director - 2009/2010	Glenn Carlson, EA
Chapter Director - 2009/2011	Amanda S. Boston, EA
Chapter Director - 2009/2011	Dennis Fullalove, EA
Chapter Director - 2009/2011	Bert Ramirez, EA
CSEA Director - 2009/2010	Liz Stettiner, EA



# GOLDEN GATE CHAPTER EDUCATION

**FULL DAY SEMINAR -- THURSDAY, JUNE 11, 2009**

*The Golden Gate Chapter is pleased to bring you a continuing series of seminars that will enhance your tax knowledge with intermediate & advanced courses.*

## **PARTNERSHIPS and LLCs** *From Beginning to End*

Presented By  
**Sharon Kreider, CPA, EA**

- ...Learn What is a Partnership and LLC
- ...Check-the-Box Rules for Formation of Entity
- ...Discover the Issues of Formality & Structure
- ...How to Record Capital Contribution of:
  - Cash • Personal Service
  - Property • Encumbered Property

- ...Discover How to Determine Inside & Outside Basis
- ...At-Risk Limitations
- ...What You Must Know When Terminating the Entity:
  - Identifying "Hot Assets" • Distribution of Property
  - Proportionate and Disproportionate Distributions

### **SEMINAR COST:**

- VIP Advanced Registration, before March 16 **\$229**
- Early Bird Registration, March 16 thru' May 8 **\$249**
- Regular Registration, after May 8 **\$289**

**TIME:** 8:15 AM TO 4:45 PM *includes Continental Breakfast, Lunch & Refreshment Breaks*

### **LOCATION:**

1221 Chess Drive  
Foster City, CA 94404

1-800-2CROWNE



**CROWNE PLAZA**

HOTELS & RESORTS  
THE PLACE TO MEET

(650) 570-5700

8 Hours CPE - Limited Seating

## **TAX SEMINAR REGISTRATION FORM**

**Your Chapter Member Education DISCOUNTS are available when you REGISTER ONLINE at [www.GGCEA.org](http://www.GGCEA.org)**

*Use this form only when you are faxing or mailing your registration and check.*

For Registration Questions, Contact: Robert Kern, EA, Education Chair at [GoldenGateEA@aol.com](mailto:GoldenGateEA@aol.com), (650) 573-5800, ext 302

Name		
Firm Name		
Address		
City	State	Zip
Phone	Fax	
E-mail address		
<i>The Golden Gate Chapter does not rent or sell your email address. Your email information is required by us for the sole purpose of contacting you regarding online registration, and Golden Gate Chapter seminars &amp; related matters.</i>		
Chapter Affiliation		
Nickname for Badge		
<input type="checkbox"/> EA	<input type="checkbox"/> CPA	<input type="checkbox"/> CTEC <input type="checkbox"/> Other _____
Enrollment or License # <small>(required for CPE Credit)</small>		
If you need special accommodations to fully participate, CHECK HERE <input type="checkbox"/> and describe: .....		

**REGISTER ONLINE AT [WWW.GGCEA.ORG](http://WWW.GGCEA.ORG)**

**FOR DISCOUNTS & CREDIT CARD PAYMENTS !**

CHAPTER PROMOTIONAL CODE = 9EDU20

GOLDEN GATE TAX SEMINAR - THURSDAY, JUNE 11, 2009

- BEFORE March 16 ----- \$229 VIP Advanced Registration**
- March 16 thru' May 8 --- \$249 Early Bird Registration**
- AFTER May 8 ----- \$289 Regular Registration**

**TOTAL ENCLOSED** \$ \_\_\_\_\_

- Registration & Check are enclosed
- Check only is enclosed - Registration faxed or entered online

**MAIL PAYMENT TO:** GOLDEN GATE CHAPTER CSEA  
PO BOX 6272, SAN MATEO, CA 94403  
**FAX: 800-886-6348**

**Make Checks Payable To: GOLDEN GATE CHAPTER CSEA**

*For added security, credit card payments are processed exclusively online at [www.ggcea.org](http://www.ggcea.org) via VeriSign®*

### **Refund / Substitution Policy**

**No substitutions without the express permission of the Education Chair and the appropriate payment of the proper registration fees.**  
Requests for registration refund must be received before June 1, 2009.  
Refunds are subject to a service charge of \$50.00