

## PRESIDENT'S MESSAGE - May 2009

*David De Koekkoek, EA, President*

Welcome back from the filing season!

Whether you feel like you are coming up for air after being underwater too long, or returning from a war with too many battles, it is a good feeling to reach April 16. Software problems, client issues and most of all the ticking of the clock cause a good deal of stress for the twelve weeks before April 15, so I hope you are taking a well-deserved breather.

I found myself saying, "I just do not know" more often this year. Generally this was in response to two types of questions: 1) What changes in tax law will there be for 2009? 2) When will I receive my California refund? Also, I just love it when there are significant tax changes in the middle of tax season that clients expect me to know about—the first-time home buyer credit and the "Making Work Pay Credit".

Tax Season also teaches me to appreciate my family and staff members who provide so much support during

the filing season. It is truly a team effort.

At the end of the filing season we received the sad news that Bill Dunlap died on April 18. Bill was a great promoter of Enrolled Agents, sometimes being referred to as Mr. EA. He was also a patriarch of our Chapter, even though he lived in Covina, he was a personal friend of a number of our members. He served our Chapter in a number of offices over the years, including several terms as president. He also served at the State level for a number of years. Bill's smile and friendly greeting could always be counted on. He was a "people" person, who willingly and enthusiastically became involved in the CSEA. We will miss him!

We are looking forward to seeing you on May 13 at the Hilton in San Bernardino. It will be a good time to relax, renew friendships, learn some valuable information and trade war stories. Each of you has something valuable to contribute, so I am looking forward to seeing you there.

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## "TAX SEASON IN REVIEW-CASE STUDIES, REVIEW & NEW LAWS"

This month's program promises to be a timely and lively topic that will have everyone on edge. "The Tax Season in Review" will include three aspects of the season.

Don Stacy, EA and Dave De Koekkoek, EA will present several unique or challenging case studies for the members to review and give their input.

Deborah St. Martin, EA will summarize the new laws that are already in place for 2009—New Home Buyers Credit, Making Work Pay Credit, and the others that are still being put in place.

Finally we will be led in a roundtable/panel discussion of how this tax season was different from others—price sensitivity issues, collections work, increase/decrease in business, new opportunities and how we as business professionals react to a changing economy.

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## Update from the Board of Directors

*Norma Rae Hill, EA, Secretary*

At the December Board meeting reports were heard from varied committees on items to occur before the start of filing season and the Treasurer Report was given.

David De Koekkoek, EA spoke for the Chair of the Scholarship Committee stating that we had received three applicants for Scholarships and the Board approved him writing a letter of recommendation to submit the applications with.

It was brought up that the Chapter needed an embroidered table cloth to use at Chapter meetings and outside functions. The Board passed a motion to approve an expenditure for such up to \$600.

I hope Filing Season went well for all our members and associates, I know for me it seemed to go in fast motion – seems like it started a week ago and now it's done!

The next meeting of the Board of Directors will be held on May 13, 2008, 4:00pm at the Hilton Hotel in San Bernardino.

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## 2008-2009 Board of Directors

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## Report of the Nominating Committee

*Gerald (Jerry) D. Watson Jr. EA, Chair*

The Nominating Committee met a number of times last year to come up with the Slate of Officers and Directors for the 2009-2010 fiscal year. It is an important function of our organization to involve many people with different backgrounds to further our purpose in making the title Enrolled Agent prominent in the tax industry and provide an increased skill level for our members. Each year the Members of the Nominating Committee are elected by the Board of Directors. It has been the custom for the Past President to serve as the interim Chair. The first order is to elect the Chair for the Committee. The members of the Committee this year were Connie Bracher, EA, Paul Cheatam, EA, Norma Rae Hill, EA, Barbara Robertson, EA and myself. We feel as though the Slate being offered will represent our members and keep the forward progression of our Chapter. We respectively submit our Slate for the 2009-2010 fiscal year:

President – Don Stacy, EA

1st VP - Connie Bracher, EA

2nd VP – Pam Jipp, EA

Secretary – Pat LaRue, EA

Treasurer- Kathryn Dunn, EA

Directors: Ken Alvarado, EA, Mike Dominguez, EA, Peggy Ligori, EA,

Don McAllister, EA, Barbara Robertson, EA, Ron Uhle, EA, and Jerry Vine, EA.

CSEA Director Paul Cheatam, EA

CSEA Representative Connie Bracher, EA

Please be present at the Annual Meeting to elect the new Officers and Directors to be held at the May meeting of the Chapter.

## Learn & Share

*Deborah St Martin, EA*

Small Business Hiring Credit - "For taxable years beginning on or after January 1, 2009, a small business is allowed a credit of up to \$3,000 for each net increase in qualified full-time employees hired during the taxable year." This is a California credit. A small employer is one who had fewer than 20 employees in the previous year.

This is a very interesting planning opportunity for all entities. Although many of our S Corps are probably not above the \$800 minimum tax, for those who are this could be a nice savings. Apparently, any employee counts!!! Great way to get back in touch with our small business owners, all entities, after the tax filing season and offer what could be a nice credit.

I learned of this credit at the Spidell Federal Stimulus Bill and California Budget Webinar held during filing season. What a valuable use of 2 hours.

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## Super Seminars Need You!

Registrations for CSEA's Annual Super Seminars are running significantly behind last year at this point. If actual attendance is well below the projected numbers, there will be a significant financial impact to CSEA. So if you had any thoughts about possibly attending, now is the time to do so. Please review the special email letter that was sent to all Chapter members last week for details. There are three different dates and two different locations to choose from. Those dates and locations are:

Las Vegas May 18—20  
Las Vegas May 21—22  
Reno May 28—30

Sign up at [www.superseminar.org](http://www.superseminar.org) or call 800-777-2732 for some super education and have a super time!

## QUICKFINDER

*Barbara Robertson, EA, Chair*

Start off the Chapter's 2009 Program year by attending the May meeting to collect a BIG MEMDER BENEFIT. Members attending five or more Inland Empire Chapter meetings from May 2009 through December 2009 receive a free 1040 QUICKFINDER. Those attending six or more meetings will, in addition, receive a free BUSINESS QUICKFINDER. Attend Chapter meetings and be sure to sign in to qualify!!! Enjoy the incomparable comradeship of your peers!!!

## "From the IRS Newswire"

### *E-File Record Set*

The IRS boasts that a record 90 million tax returns were filed electronically this year.

For the first time, more than 30 million individual income tax returns were filed from home computers. By April 24, the IRS had accepted 31.2 million returns filed from home computers, up 19.3 percent from the same time last year.

IRS e-file broke the 90 million mark this year. By April 24, the IRS had accepted 90.6 million income tax returns through e-file, up almost 6 percent compared to the same time last year.

### *Final Case Dispositions on Tax Professionals*

The Office of Professional Responsibility (OPR) publishes decisions on its cases, once they become final agency decision. To read the final decisions, and OPR standards of practice visit [www.irs.gov](http://www.irs.gov).

## Volunteers WANTED - DEAD OR ALIVE!

In planning for the great year ahead of our Chapter, your help is need as a leader. (By the way, we'd much rather have leaders alive, so try to stay that way).

There are many exciting positions to fill, and every committee needs more members. This could be your opportunity to mold the shape of the future!

Mark your preferences on the list below and FAX it to 951-244-0475 or email it to [taxman@ez2.net](mailto:taxman@ez2.net). Please number your responses in order of your preference.

Bylaws and SOP's	_____
Disaster Service	_____
Education	_____
Ethics & Professional Conduct	_____
Finance & Budget	_____
Financial Review	_____
Historian	_____
Legislative	_____
Membership	_____
Newsletter	_____
Program	_____
Public Information & Awareness	_____
Scholarshi	_____
Seminars	_____
Strategic Planning	_____
Website	_____

ALSO...

Debi Nogle is looking for volunteers for the CSEA 33rd Annual Meeting in Torrance, CA June 22 - 27, 2009. If you can help, please let Debi know [dongle@csea.org](mailto:dongle@csea.org) or 916-366-6646.

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# Mark Your Calendars!!

## Wednesday, May 13, 2009

May 18—20

May 21—22

May 29, 2009

May 28—30

Wednesday, June 10, 2009

July 7-9, 2009

Wednesday, July 8, 2009

Sunday July 12, 2009 2:30PM

July 14-16, 2009

Wednesday, August 12, 2009

August 9-12

**Chapter Meeting** — *"TAX SEASON IN REVIEW-CASE STUDIES, REVIEW & NEW LAWS"*

**4:00 Board Meeting; 5:30 Social; 6:00 Dinner; 7:00 Program**

Las Vegas Super Seminar A

Las Vegas Super Seminar B

NTPI Scholarship Application due

Reno Super Seminar

Chapter Annual Meeting & election,

IRS Nationwide Tax Forum, Las Vegas, NV

Chapter Meeting

Chapter Planning Retreat

IRS Nationwide Tax Forum, San Diego, CA

Chapter Meeting

NAEA National Tax Practice Institute & Annual Meeting Sheraton Baltimore Center City Hotel, Baltimore, MD

The Inland Empire chapter of CSEA is now able to accept all VISA, Master Card, Discover and American Express credit cards for our monthly meetings and continuing education. Sorry, no debit cards. You will find an insert in the newsletter that will help you provide all of the information needed to charge your card. After you have completed and signed the form, fax to 909-533-2159 or attach the form to an email and email to Kathy@ctbpro.com. If you are charging a monthly meeting, you will still need to get this information to me by Friday before the meeting to get the lower meeting rate.

Due to Hotel Policy dinners will not be provided without prior reservations. Beginning with the May 2009 meeting there will be a price increase. Chapter Program cost is \$40 for members (\$45 for non-members and guests) for reservations made by 4 p.m. on Friday preceding the program. Late reservations are \$10 additional and can be made until 12 noon Wednesday of the program. Walk-in's to Seminar is \$50.

RSVP TO: kathy@ctbpro.com or 909/466-6900. Meeting location: Hilton Hotel, 285 Hospitality Lane, San Bernardino. THANK YOU

## May 13th MENU

Green Salad with choice of Ranch and Italian Dressings;

Chicken Cordon Bleu;

Rice Pilaf;

Bouquet of fresh vegetables;

Hot rolls and butter;

Dessert is Chef's choice; Coffee or tea.

Vegetarian dinner is available by advanced request.

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Return Service Requested

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Inland Empire Chapter CSEA

# Chapter IdEA's

First Class Mail