



Chapter IdEAs

"To Promote the Professionalism and the Growth of Our Members"

CSEA Inland Empire Chapter June 2010



Exit and Entrance Strategies — June Topic

Joel Hedriks, EA, Education Chair

When the circumstances of one's life change and one is no longer able or has the desires to keep up with the pressure and demands of their practice, what are the ways out. Likewise, when one wants to get into practice or expand an existing one, what are the things that one wants to consider. What constitutes the value of a practice and how should making these calculations be a part of one's business plan?

Mr. David Smith will be speaking to the Chapter this month about the various factors that determine the value of a tax and/or bookkeeping practice and buying/selling a practice. There will also be an open forum for asking questions.

David is the President of Business Brokerage, Inc which has since 1978 specialized in the sale of accounting & tax practices. The firm is involved in appraising, listing, marketing, arranging financing and selling of practices throughout California. It has sold over 1,400 accounting and tax practices.

He has an AA degree in Real Estate from Santa Ana College and his BS degree in Finance from California State University at Long Beach and has taken undergraduate studies at Indiana University. He has presented seminars on Valuation of Accounting and Tax Practices at CSEA "Super Seminars," the Orange County Society of CPA's, SFV EA's, Inland Society of Tax Preparers, San Diego Chapter of CSCPA's and other professional groups.

PRESIDENT'S MESSAGE

Don Stacy, EA, Inland Empire Chapter President

The Inland Empire Chapter of the California Society of Enrolled Agents has had a great year, growing not only in numbers but in spirit as well. As I write this final President's Message I feel confident for the future of our Chapter and for CSEA in general.

We began our year with a great planning session in Ontario. The goals for our Chapter this year were to foster better educational opportunities, increase attendance at our monthly meetings, and to grow our membership to over 200. I announced our membership campaign of "Each One Bring One" to our monthly meetings as a major element in this year's Chapter Strategic Plan. While we did not reach that membership goal, attendance at our monthly meetings grew and our numbers did increase. We can look forward to continuing this trend in the future!

We were honored to co-host the 2009 Annual Meeting of CSEA in Torrance in June. Several of our members were able to attend and report back to the Chapter. As we look forward to the coming Annual meeting in Rohnert Park we can feel confident that CSEA will continue to represent us on the State level to protect our right to practice and to provide us with even more member benefits.

Our meetings this year emphasized professional growth, starting with ethics and ending with exit strategies. When CSEA President David Shaw visited our Chapter in December as our speaker he shared his dreams for the Society. One of the challenges facing our Chapter will be to recruit new and younger members. I'm sure Connie Bracher is up to this challenge.

On a sad note, we lost two of long time pillars of our Chapter. Bill Dunlap, EA was a tremendous supporter both at the local level and at State. Tennie Becker, EA straightened out the Chapter books several times and was a tireless supporter for potential EA's to receive scholarship help from CSEA. Also, Tennie was an inspiration with her courage in fighting for her health. We will miss both of these Enrolled Agents!

I would like to thank each member of our leadership team for their dedication and service this past year. As a team we have had a great year, and I am pleased to report that the Inland Empire Chapter remains fiscally sound, energetic, and ready to move forward this next year.

Update from the Board of Directors

Pat LaRue, EA, Secretary

At the May 12 Board Meeting reports were heard from various committees and the Treasurer's Report was given.

Connie Bracher EA discussed the upcoming planning retreat to be held at her office in Crestline. Maps were provided. She fielded suggestions for program speakers and topics for the upcoming year. This will be one of many topics covered at the planning session. Connie encouraged participation on the many committees in our Chapter. She feels that there should be no such thing as a one person committee.

Jackie Kincaid, EA shared her experiences at the recent Legislative Day in Sacramento and the CSEA Board meeting. She currently serves as the Chapter Legislative Chair.

President Don Stacy EA sought input on what we feel CSEA should be providing in the way of membership benefits. Any interested members are encouraged to attend the Annual CSEA meeting this June at Rohnert Park.

Don McAllister EA announced that the Chapter awards will be held at the June meeting. The election and installation of next year's Officers and Board will take place at the June meeting also. Our Newsletter editor presented the draft and sought additional input for the June Newsletter. He also is seeking input in the 2010-2011 Master Schedule for the upcoming year.

The slate of Officers and Directors was presented at the general meeting. Each candidate present was introduced. The election will take place at the June meeting.

The next meeting of the Board of Directors will be held on June 9, 2010 at the Hilton Hotel in San Bernardino.

2009-2010 Board of Directors

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Meet the Nominees

Connie Bracher, EA is nominated for the office of president. This will be the second time she has occupied the chair for the Chapter. She became an EA in 2000; joined CSEA immediately; became a member of the Inland Empire Chapter Board of Directors that same year; and has been an active member ever since. Over the years she has served as PIA Chair, Disaster Chair, Membership Chair, Secretary, 2nd VP, 1st VP, and in the year 2006-2007 served as President. Additionally, she has been active on the State CSEA Level, having served as Chapter Representative and as the State Committees Disaster Chair, Vice-Chair of Scholarship, and Vice-Chair and Chair of the Legislative Committee. In 2008 she became an NTPI Fellow in the National Association of Enrolled Agents.

Prior to becoming an Enrolled agent, she was employed as the Comptroller of Imperial Trust, International Hotel, and the Inland Empire Hilton Hotel. While being employed in these positions, she began working with the IRS, State Banking Commission and the SEC.

She opened her own company in 1998 in Crestline providing bookkeeping, payroll, tax preparation and tax representation services. She continued to expand her practice and with her husband Mike built and moved into their own building in 2009.

She would like to see the Inland Empire Chapter become the best Chapter in Southern California, then California, through our educational opportunities and membership goals for all Enrolled Agents. As Phil Jackson stated: "The strength of the team is each individual member...the strength of each member is the team." And we have a grEAT Team!

Connie is open to and welcome to discuss all areas of concern from members. Additionally, She also welcomes the positive – praise, suggestions, and/or volunteering time and expertise to the benefit of all Enrolled Agents.

Pam Jipp, EA is nominated for the position of 1st Vice President on the Board. She will also be attending the State CSEA meetings as the Chapter Representative. She became an EA 2003. She currently is associated with Top of the Line Tax Service, Inc. which has three offices located in Southern California. They currently have 3 EA's and 6 CTEC preparers that offer tax preparation, planning and representation as well as bookkeeping and payroll service. Pam prepares about 600 returns a year as well as doing representation work.

Her vision for the Chapter is to increase the Chapter's membership by offering quality speakers on tax relevant topics. Members can feel free to call her for any and all tax related and CSEA issues.

NormaRae Hill, EA is nominated for the position of 2nd Vice President. She will also occupy the Membership Chair.

As an EA she has worked doing tax preparation in an CPA firm for 2 years and an EA firm for 8 years. Prior to that she was a bookkeeping supervisor working in both EA and CPA firms. The firm she works for consists of 2 EA's, 1 CTEC, and 1 CPA. They do over 1200 returns. Norma does most of the Corporate, Partnership, and Exempt returns. In addition, she has about 300 individual tax clients.

Her vision for the Chapter is that by its activity, other EA's would see the benefits of being part of CSEA and the Inland Empire Chapter. She is particularly open to discuss small business/ tax exempt questions from members.

Pat LaRue, EA is nominated for the position of Secretary. This will be her second year serving in that capacity. She has been an EA for six years. She works seasonally for H&R Block doing individual tax returns and mentors new preparers.

Prior to that she has had 11 years experience as a tax preparer and worked 10 years as office manager for a small non-profit. She served as treasurer of the American Federation of Mineralogical Societies.

Her vision for the Chapter is that it continues to be a source of quality education and promote the image of Enrolled Agents. She would also like to see more CTEC's encouraged to become EA's.

Jackie Kincaid, EA is nominated for the position of Treasurer. She has been an Enrolled Agent since 2006 and has worked for Barbara Robertson for the last eight years.

Her vision for the Chapter would be to see the Chapter membership grow.

Clara Barrett, EA is nominated for the position of Director. Since 2004, she has been self-employed in tax preparation and audit representation. Prior to that, she retired as a Revenue Agent for the IRS after 24 years of service. Other experience includes a bachelor's degree in Communication and a California Teaching credential.

Her vision for the Chapter would see the membership and the educational offerings expanded. Members can feel free to discuss any IRS audit issues with her.

Joel Hendriks, EA is nominated for the position of Director. He has been an EA since 2005. In 2008 he began his own practice in Yucaipa, CA. He joined CSEA in 2009 and served as the Education Chairperson this past year.

He received his B.S. degree from the University of California, Riverside in 2005. After graduation he spent 3 _ years working with a mid-sized CPA firm, where he spent three quarters of his time working as a financial statement auditor in the areas of agribusiness, mutual water companies, school districts, and not-for-profit organizations. The other quarter time was spent as a seasonal supervisor at the firm's satellite office. Prior to graduation, he worked for three years as a part time CTEC tax preparer and bookkeeper for Janice Baker, EA, while preparing for the SEE exam.

His practice, located in Yucaipa, CA consists of approximately 400 individual and 60 business tax clients. In addition to tax and representation services, it provide a full range of business services including, consulting, bookkeeping, payroll, and training. This past year has seen the addition of Charitable Remainder Trust preparation to their roster of services, and in the coming year he hopes to add financial planning services.

His vision for the Chapter is to see an increase in the value of membership by continuing to provide outstanding education, increased public awareness of the profession, and ensuring that the concerns of members is heard by our legislators.

As the Legislative Chairperson this year, I will be doing my best to keep you all up to date on current legislative proceedings, which will affect both your practice and your clients. As I will be making an effort to make contact with local legislators, I invite you to contact me with issue that you would like brought to their attention. Additionally, I will be able to provide contact information for those of you who would like to become directly involved.

Donald H. McAllister, EA is nominated for the position of Director. He became Enrolled in 2000.

Prior to become an Enrolled Agent, he prepared a small number of tax returns part-time for about 20 years. He retired from the Defense Department after 31 plus years of service. He holds a BS degree in Civil Engineering, an MS in Environmental Science, and a MBA. He is a registered Civil Engineer and a sports official football, basketball, and baseball.

He opened his own practice in 2000, preparing individual, small business, corporate, and exempt organization tax returns. He provides representation services to his clients as well as taking new referrals.

His vision for the Chapter is to provide relevant educational topics, ensure the organization is financially sound, see that membership continues to grow, and to gain a better insight as to what the membership needs are. Members can contact him to discuss

any item an individual may have and wants brought forward to the Board.

Ron Uehle, EA is nominated for the position of Director. He has been an EA since May 2003.

He has worked in the tax/accounting industry for 28 years. The first 21 years with his father's CPA firm in Huntington Beach and the last 7 at GTS Financial in Chino.

GTS Financial Services offers tax services for individuals and business; payroll and bookkeeping services; retirement planning and investment services; and audit representation.

His vision for the Chapter would be to see the Chapter increase its membership and to continue to offer high quality education.

Members can contact him to discuss the budget and financial review for the Chapter.

Jerry Vine, EA is nominated for the position of Director. He has been an EA for Three years. He has been in the Accounting and Tax profession since 1989 working for small firms through the final four. Currently, he has a small practice dedicated to giving the best quality service to each individual and/or entity that engages him for his services.

His vision for the Chapter is see it grow. There are many members that just pay their dues and do not attend the monthly meetings. It would be great to fill that room with all of our members. He is willing to help members in any area of the tax arena that can help benefit the taxpayer or the Tax Professional. It is nice to call a peer and be able to listen or maybe talk it out loud to get the best results.

Two other nominees, **Leroy Beeken, EA** and **Mike Dominguez, EA** both nominated for the position of Director, did not get their information to the Editor.

CHAPTER NOTES

Pre Pay and Save \$40

July is when you can pay \$280.00 for all eight meetings during our 2010-11 fiscal year. When you prepay, you do not have to be concerned about any increase in fees until the following July. Just bring a check payable to CSEA for \$280.00 to the July meeting. If you want to pay by credit card, fill out our form located on our website www.ietaxpro.com. Click on Payment by Credit Card and follow the links to the form to charge your credit card.

When you pay in advance you save \$40.00 and no RSVP required, you only need to call if you are NOT going to attend a monthly meeting.

Quickfinder

Attend our meetings and sign in!!! Enjoy comradeship with your peers!!! Members attending five or more meetings from May 2010 though December 2010 will receive a free 1040 QUICKFINDER. Those attending six or more, will in addition receive a free BUSINESS QUICKFINDER. Any questions call Barbara at (909) 466-7466.

Awards

Chapter Awards will be presented at the June meeting and the recipients will be published in the July Newsletter.

Mark Your Calendars!!

Wednesday, June 9, 2010

Chapter Meeting — *Election & Installation, Chapter Meeting: "Exit Strategies" David Smith*

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

Dinner choice of Vegetarian Plate or Caesar Salad, Meat Lasagna, Fresh Vegetables, Garlic Bread Sticks, Dessert

Chapter Meeting location: Hilton Hotel, 285 E. Hospitality Lane, San Bernardino, CA.

Wednesday, July 14, 2010

Chapter Meeting:

Wednesday, August 11, 2010

Chapter Meeting:

Wednesday, September 8, 2010

Chapter Meeting:

Wednesday, October 13, 2010

Chapter Meeting:

November 4 & 5, 2010

ClientWhys Seminar Hilton Hotel, Ontario, CA

Wednesday, November 10, 2010

Chapter Meeting:

Wednesday, December 8, 2010

Chapter Meeting: *Legal Issues for EA's*, Sherrill Gregory

Due to Hotel Policy dinners will not be provided without prior reservations. Chapter Program cost is \$40 for members (\$45 for non-members and guests) for reservations made by 4 pm on Friday preceding the program. Late reservations are \$10 additional and can be made until 12 noon Wednesday of the day of the program. Walk-ins to the Seminar are \$55. RSVP to kathy@ctbpro.com or 909-466-6900.

The Inland Empire Chapter of CSEA accepts all VISA, Master Card, Discover, and American Express credit cards for payment of continuing education credits. Sorry, no debit cards. To pay by credit card, go to www.ietaxpro.com, on left hand bar click "payment by credit card" and then download "IE Chapter Credit Card Form". After you have completed and signed the Form, fax to 909-533-2159 or attach to an email and send to: kathy@ctbpro.com. All information must be received by 4 pm Friday preceding the monthly meeting to receive the lower rate.

*Renew your Membership.
Dues for CSEA and NAEA due
at the end of June 2010*

Get your own Ad in the Chapter's Inland Empire Magazine Enrolled Agent spread. Form posted on the Chapter Website at www.ietaxpro.com

*Be sure to Pre-Pay for the
Chapter's 2010-11 Program year.*

*Pay by check at the June meeting on
on the web at www.ietaxpro.com.*

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Chapter IdEA's