



Chapter IdEAs

"To Promote the Professionalism and the Growth of Our Members"
CSEA Inland Empire Chapter July 2009



"Taxes, Alcoholism and Your Clients"

The July program will be presented by Doug Thorburn, EA, CFP. Doug is a noted speaker on tax and financial planning topics for both professionals and non-professionals. He has authored four books and hundreds of articles that have been published in professional journals and his own newsletters for clients and professionals. Through his research in alcohol addiction, he has been able to "increase awareness of the adverse financial impact of substance addiction in others on clients' ability to preserve capital and produce income".

Doug was among the top 21 of all candidates tested nationwide for the 1978 examination. He began preparing tax returns in 1976 and has continued since becoming an EA in 1980. In 1983 he became a Certified Financial Planner after having passed a rigorous series of examinations given under the authority of the International Board of Standards and Practices for Certified Financial Planners. As a CFP he adheres to a rigid code of ethics, and meets specific experience and educational standards set by the IBSP.

Doug has been active with the California Society of Enrolled Agents since 1982 serving on many committee assignments, including Chairs of Long Range Planning and 1994 Convention Committees. He is a past President of the San Fernando Valley Chapter and a member of the National Association of Enrolled Agents.

For a unique look at tax and financial strategies, go to www.dougthorburn.com. To see a new and refreshing view of alcoholism, subscribe FREE to the monthly on-line www.addictionreport.com and check out Doug's books at: www.galtpublishing.com.

PRESIDENT'S MESSAGE

Don Stacy, EA, President

Are you ready to have some fun? I often tell clients that we should only do work that we consider fun, so that work doesn't seem like work. I really enjoy what I do, and like helping people in crisis handle their audit and collection issues. Something I hear regularly from my clients is that they appreciate me making a stressful situation like taxes manageable, and taking a burden off of them.

As a local Chapter of CSEA I want our members to enjoy what they do, have fun doing it, and feel rewarded for having done it. Let's strive to make our monthly meetings informative and fun.

Since joining CSEA in 1986, I have not missed a Super Seminar. Just that educational opportunity alone makes membership worthwhile. At the last Las Vegas Super I won the door prize which is the entire Quickbook Library for next year. What a benefit!!

Once again we are offering a bargain for those who regularly attend chapter meetings. To prepay for the year the cost is only \$280 plus you don't need to RSVP. Not only do you save money, but you will be automatically confirmed for all meetings.

The Quickfinder Attendance Reward once again is being given. You will earn a free 1040 Quickfinder for attending five meetings plus the Business Quickfinder if you attend six.

For those who have agreed to chair a committee this coming year I want to give you a special thank you. My charge to each committee chair will include grooming your replacement for 2010-2011 so we will continue to have an orderly transfer of duties come next year.

We've got a full year of exciting plans and opportunities for you to participate in. My goal is to see our Chapter grow to over two hundred EA members and to get more participation in our programs. For your suggestions or concerns, please email me at dstacy@clpros.com. See you on July 8th.

UPDATE FROM THE BOARD OF DIRECTORS

Norma Rae Hill, EA, Secretary

At the June Board meeting reports were heard from various committees and the Treasurer Report was given.

Don McAllister, EA, Chair of the Awards Committee presented for discussion the creation of a new award, the "Bill Dunlap Memorial Award". This was unanimously approved. In the coming months the Board will hear more about what the Award will be given for and whether it will be an annual award or one given as warranted each year. With the years of service Bill gave our Chapter it is a very fitting way to honor his memory.

President Dave DeKoekkoek, EA brought us a possible PIA opportunity that Deborah St. Martin, EA has suggested. This is to take part in an interview on NewsTalk Radio Station. The Board has agreed the PIA Committee would look into the details.

President Dave DeKoekkoek, EA also gave us the news that Tinnie Becker is resigning from the position as Scholarship Chair due to health reasons. We will miss the excellent work she has done in this position.

Dawn Powers, EA shared a discussion she had with Lynn Freer concerning the possibility of sponsoring Spidell's Summer Estate & Trust Planning Seminar. The Chapter would benefit from any members signing up through the Chapter. It was agreed by the Board to follow this up.

Paul Cheatham, EA shared with us the current CSEA news and let us know that although he was no longer on the Executive Committee he would be Chairing the Audit Committee this year and would continue to keep us informed of relative issues that occur at the State level.

Later in the evening, after the program, the next year's slate of officers were sworn in. Absent directors and officers will be installed at the next monthly meeting. Richard Franke, EA received the Jim Kanouse Award for his unfailing work within the Chapter, especially the Newsletter. Steve Davis, EA and Michael Dominguez, EA jointly were awarded the new Bill Dunlap Memorial Award for the above and beyond work they do in presenting Seminars such as the Representation Seminars

2009-2010 Board of Directors

President
Don Stacy, EA
951/244-1513
dstacy@clpros.com

1st Vice President
Connie Bracher, EA
909/338-0041
connie@acorntax.com

2nd Vice President
Pam Jipp, EA
760/955-6434
Anhy@aol.com

Secretary
Pat La Rue, EA
909/874-5664
bplarue@earthlink.net

Treasurer
Kathryn Dunn, EA
909/466-6900
kathy@ctbpro.com

Past President
David DeKoekkoek, EA
909/467-5333
dave@ddktax.com

CSEA Director
Paul Cheatham, EA
909/944-0446
paul@cheathamassociates.com

CSEA Representative
Connie Bracher, EA
909/338-0041
connie@acorntax.com

Directors
Kenneth Alvarado, EA
909/794-2901
alvaradotaxman@aol.com

Michael Dominguez, EA
951/276-2999 Ext. 7001
atsmd@earthlink.net

Peggy Ligori, EA
951-654-9955
peggy@vanguardtf.com

Donald McAllister, EA
951/688-3263
dhmcall@pacbell.net

Barbara Robertson, EA
909/466-7466
Bjtaxx@aol.com

Ron Uhle, EA
909/590-5664
ruehlenhb@yahoo.com

Jerry Vine, EA
909/466-5387
jerry@msjjetpro.com

CSEA Inland Empire Chapter Committee Chairs 2009-2010

AWARDS
Don McAllister, EA
951/688-3263
dhmcall@pacbell.net

BUSINESS RETENTION
Ken Alvarado, EA
909/794-2901
alvaradotaxman@aol.com

BYLAWS & SOP'S
Dawn Powers, EA
951/686-8254
dapowwrks@sbcglobal.net

DISASTER SERVICE
Ken Alvarado, EA
909/794-2901
alvaradotaxman@aol.com

EDUCATION
Joel Hendricks, EA
909/797-1366
joel.baker.tax@verizon.net

ETHICS & PROF. CONDUCT
Jerry Watson, EA
951/242-8920
gwatsontax@hotmail.com

FINANCE & BUDGET
Don McAllister, EA
951/688-3263
dhmcall@pacbell.net

FINANCIAL REVIEW
Ron Uhle, EA
909/590-3423
ruehlenhb@yahoo.com

HISTORIAN
Janice Baker, EA
909/797-1366
bakertax@verizon.net

LEGISLATIVE
Deborah St Martin, EA
951/922-6619
Taxlady5@verizon.net

MEMBERSHIP
Pam Jipp, EA
760/955-6434
Anhy@aol.com

NEWSLETTER
Richard Franke, EA
951/652-6105
editor@ietaxpro.com

PROGRAM
Dennis Phillips, EA
909/793-1021
dghill33@earthlink.net

PUBLIC INFO. & AWARENESS
Clara Barrett, EA
951/924-6450
clarabarrett@msn.com

SCHOLARSHIP
Pam Jipp, EA
760/955-6434
Anhy@aol.com

SEMINARS
Steve Davis, EA
951/276-2999
atssteve@earthlink.net

STRATEGIC PLANNING
Connie Bracher, EA
909/338-0041
connie@acorntax.com

WEB-SITE
Joe Ligori, EA
951/654-9955
joe@ligoritax.com

that bring so much to the Chapter and our individual membership.

With this Update I am officially passing the reigns over to the new Chapter Secretary, Pat La Rue, EA. It has been both an honor and a privilege to serve as Secretary for the past two years. I am sure Pat will continue to keep everyone informed of the relevant issues the Chapter faces.

The next meeting of the Board of Directors will be held on July 08, 2009, 4:00 pm at the Hilton Hotel in San Bernardino.

CSEA DIRECTOR'S REPORT

Paul Cheatham, EA

Greetings from Reno!!! I just completed attending the Board meeting here and thought I would draft this while it is still fresh in my mind.

I have been selected to Chair the Audit Committee of CSEA for the next three years. So, Monday I attended the pre-sumptive committee chairs meeting. Incidentally, our own Don Stacy will be a member of this committee and Barbara Willingham (CSEA Secretary) will be the third member. I have also asked several other EA's from other chapters to serve as supporting members. David Shaw, CSEA President-elect, conducted the pre-sumptive chair meeting which lasted for a couple of hours. He also announced that a Technology and New Member Task Force has been created to facilitate CSEA's endeavors in these areas. Immediately following the pre-sumptive chairs meeting I attended the Executive Committee meeting. Most of the time there was spent reviewing the Executive Vice President's evaluation, contract and compensation. Our recommendation was presented to the full Board the following day.

Tuesday started at 8:00 AM with a one-hour Board meeting. At this meeting the President (Connie Ferrell) makes opening remarks, some housekeeping is attended to and the Board heard the recommendation coming from the Executive Committee meeting held Monday evening. I am pleased to report that the findings were that staff is doing a good job running our SOCIETY and that the EVP's contract will continue on for another year. Last year there was some mention that Cathy may resign, this year that topic did not even come up. Given the challenging times we are in it is good news for all of us that there will be stability in the staff! The rest of the day was devoted to committee meetings and informal discussions (some in the bar) where some of the most important discussions are held!!!

Wednesday started at 8:00 AM with the Board meeting to review all of the remaining agenda items and motions brought from the various Committees. We adopted a more concise mission statement, approved a new policy governance manual, approved the 2009/2010 budget, voted in the 2009/2010 nominating committee, selected various award recipients and heard various motions. The most controversial motion was brought by Gary Ansbaugh (East Bay). His proposal is to limit the term of State Directors to 2 two-year terms. He believes that some Board members become too fond of their position and that it denies other members the opportunity to serve. While I agree with the intent of his proposal, I spoke against it on the grounds that this is a Chapter issue and that it will result in less-experienced Board members. You may recall that I announced a self-imposed term limit of two terms. What do you think? Please advise.

It continues to be an honor to serve our Chapter and our Society.

CSEA REPRESENTATIVE'S REPORT

Don Stacy, EA

I attended the CSEA Board meetings held in Reno May 26-27 in Reno, Nevada. A new mission statement for CSEA was adopted:

The California Society of Enrolled Agents is a progressive, professional association dedicated to serving EAs in California and abroad, enabling them to grow, prosper, and lead as The Tax Professionals while serving taxpayers in a dynamic, rapidly changing environment with integrity and trust.

Also adopted was a new "Board Policy Governance Manual". This document replaces the Policy Manual and defines the responsibilities and duties of Board members, committee chairs, and staff. I'd be happy to email a copy to anyone who would like to have it, Please request it by emailing me at: dstacy@clpros.com.

As Chairman of the Finance and Budget Committee, I presented a balanced budget to the Board that was approved as presented. CSEA continues to be strong financially with good reserves remaining. The building and equipment in Sacramento are fully paid for and the Society is debt free.

The Board voted on the recipients' of the: Booster of the Year; Enrolled Agent of the Year; Chapter of the Year; and Professional Affiliate of the Year Awards. They will be presented at the Annual Meeting in Torrance.

Regarding limiting the term for State Directors, it was proposed that it be limited to four years with a break of two years required before a total of eight years be allowed for lifetime service. The consensus of the Board was that it would be well for the Chapters to send a variety of representatives to CSEA rather than continue the same representation every year. This issue was referred to the Bylaws Committee for drafting.

I have been appointed to the Audit Committee for a three-year term. Paul Cheatham will be Chair this coming year.

MEET THE BOARD — 2009-2010

Ken Alvarado, EA is a Director on the Board and chairs two committees, the Disaster Committee and the Business Retention Committee.

He has been an EA since 1996. He started preparing tax returns professionally in 1974 for Tax Corporation of America and later IPS as a mobile preparer. In 1992 he set up his business in his home and still practices there. His practice is comparatively small and he handles it himself. He concentrates on tax preparation and does some representation as well.

His vision for the Chapter is to keep spreading the word about Enrolled Agents. He sees the Chapter being a leader in the Inland Empire in making the EA designation a "household name" in Tax.

Barbara Jo Robertson, EA, CFP is a Director on the Board and is Liaison for Quickfinder, ClientWhys, Brass Tax, and Spidell. She has been an EA since 1985. She has been active in Chapter affairs, having served the Chapter as 1st vice president, Secretary, Director, Membership Chair, and Editor of "Chapter IdEAs". For over five years she taught tax classes at Chaffey College.

Her practice is a 2 person office with an extra part-time staff person as needed. It consists of 600 clients including 100 business tax returns. Besides tax preparation it includes: audit representation, bookkeeping and payroll, and financial planning and security sales.

Her vision for the Chapter is "see it grow and retain membership while keeping membership affordable and meetings educational and friendly.

Paul Cheatham, EA is serving his second two-year term as the Chapter's CSEA Director on the State Board. Since 1986 he has been a self-employed full-time EA. On November 10, 2006 he sold his large practice in Rancho Cucamonga with eight employees to a CTEC husband and wife team. They abandoned the practice on September 1, 2007 and he resumed a "down-sized" practice with one other preparer (a Tax CPA) and two front office people. He intends to operate a small practice forever. His initial experience professionally was with the IRS beginning in 1972 (EA number 23531) and continuing until 1979 when he left the IRS to work in various accounting positions and prepared tax returns "part-time". He would like to see the Chapter develop a reputation for putting on excellent continuing education programs. He remembers when Jim Kanouse started the Chapter and it was one of the few organizations offering affordable high-quality education. It was not unusual then to have one hundred or more people attend meetings. Over the years he has seen other organizations offer quality education with a corresponding drop in attendance for the Chapter. During the last few years' attendance at Chapter meetings has grown. He attributes this to the generally good quality of CPE at the meetings. He would like to see new ways to provide high-quality CPE at affordable prices. He believes that by building on a foundation of education, all the other good things that we want for the Chapter will follow.

Jerry Vine, EA, MBA is a newly elected Director to the Board. He has been an Enrolled Agent for two years. His practice is small but growing, being dedicated to giving the best quality service to each individual and/or entity that engages in his services. He offers tax preparation, bookkeeping, IRS problem resolution, and tax planning

Prior to that, he has been in the accounting and tax profession since 1989 working for small firms through the final four big firms. He is looking forward to being on the Board and serving the Chapter membership.

Chapter Awards

At the June 10th Chapter meeting Don McAllister, Chair of the Awards Committee recognized the following individuals for having contributed to the enhancement and/or improvement of the status of the Chapter:

Richard Franke, EA was honored with the Jim Kanouse Award for all his long and continuous contributions to the Chapter and CSEA while serving on the Board and Committees, mentor to others, and especially for his diligent work in publishing an informative and beneficial Chapter Newsletter.

A newly established award the Bill Dunlap Memorial Award was given to Steve Davis and Michael Dominguez for their long and continuous efforts in service to the Chapter in numerous capacities but especially to ensure the success of the Chapter Advanced Representation Seminar and IRS Practitioner Seminar, which have continuously produced revenue for the Chapter and outstanding educational value for members and non-members alike.

At our July meeting the Chapter will honor the Inland Empire Chapter Enrolled Agent of the Year, Booster of the Year, and our President as he passes the gavel to Don Stacy, EA, the incoming 2009-2010 Chapter President.

To our June Honorees and those being honored in July, the Chapter thanks you for all the time and labor you have put into the success of the Inland Empire Chapter this past year.

Chapter Seminar Co-sponsorships

The IE Chapter co-sponsors several educational seminars. The current ones are ClientWhys, Brass Tax, and Spidell's Summer and Trust seminars. The Chapter receives commission based on the number of attendees that sign up for each. HOWEVER, one must register using an Inland Empire Registration form for the Chapter to get paid. Please call Barbara (909) 466-7466 with any questions and for further details.

2009-2010 Chapter Budget

The first draft of the Chapter 2009-2010 Budget was reviewed by the Board at its June meeting. It is anticipated with additional data received during the final month of the current fiscal year prior to the next Board of Directors meeting in July, the Board will be able to give it's approval, and the 2009-2010 Chapter Budget will be published in August Newsletter

The Primary Sources of Chapter income for 09-10 are: 1) member dues (\$25 each) collected by CSEA and forwarded to the Chapter Treasurer. 2) monthly meeting fees were increased as members prepay \$280.00; members registering for individual meetings pay \$40.00 each; non-members for individual meetings pay \$45.00 each. 3) fees from sponsored seminars by Brass Tax, Client Whys and fees from the Chapter sponsored IRS Practitioner & Advanced Representation Seminar. The IRS seminars are the Chapter's major source of net income.

The greatest expenditures are seminar expenses, Board expenses, Quickfinders, advertising, and Newsletter. There was a slight increase in the budget for our seminar expenses, Newsletter, and Website operations. Decreases were made in Advertising, National & State meetings, and the Chapter Board meetings. Overall, budgeted expenses decreased by \$1,500.00 from the prior year.

With a balanced budget the IE Chapter is in a sound financial condition. This will allow the Chapter to maintain its reserves so it can continue to front monies for sponsored seminars and approved activities, as well as having funds for unexpected and unforeseen developments.

Chapter Prepay Plan

July 2009 is when you can pay \$280.00 for all eight meetings during our 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.

Mark Your Calendars!!

Wednesday, July 8, 2009

Chapter Meeting — *"Taxes, Alcoholism and Your Clients"* Presenter: Doug Thorburn, EA, CFP

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

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

Dinner choice of Vegetarian Plate or London Broil with Red Wine and Mushroom Sauce, Roasted Red Potatoes, Vegetables, Rolls, and Dessert

July 7-9, 2009

IRS Nationwide Tax Forum, Las Vegas, NV

Wednesday, July 8, 2009

Chapter Meeting

Sunday July 12, 2009 2:30PM

Chapter Planning Retreat

July 14-16, 2009

IRS Nationwide Tax Forum, San Diego, CA

Wednesday, August 12, 2009

Chapter Meeting

August 9-12

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

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 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.

Chapter IdEA's is published May-January by the Inland Empire Chapter, CSEA. Classified ads are free to members up to 35 words; for non-members the cost is \$25. The Newsletter subscription is \$15 per year. It is distributed free to members of the Chapter. Checks payable to CSEA; include your name, address, email, and phone number; send to Kathryn Dunn, EA; 8480 Red Oak; Rancho Cucamonga, CA 91730. Editorial Board: Connie Bracher, EA; Deborah St Martin, EA; Clara Barrett, EA.



Return Service Requested

4251 Park Ave.
Hemet, CA 92544

www.ietaxpro.com

Inland Empire Chapter CSEA

Chapter IdEA's

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