



California Society of Enrolled Agents
Inland Empire Chapter

Chapter IdEAs

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

CSEA Inland Empire Chapter November 2010



OUR CLIENTS, TAXES, AND BANKRUPTCY

David DeKoekkoek, EA, Program Chair

Fred Cohen, bankruptcy attorney, will be talking to us specifically about bankruptcy and taxes. He will also share some of his pet peeves of things done by tax preparers of all sorts that come back to haunt the client. With an increasing number of clients facing or already in bankruptcy this is a very timely topic. We will hear when and how income taxes and other taxes are discharged in bankruptcy and when they are not. What happens when the government, in particular the IRS, goes to the front of the line of creditors and how this affects everyone else. This presentation will be very helpful in giving us guidance on how to deal with clients who are in financial trouble while keeping ourselves out of trouble. And if you happen be going bankrupt.... Well, it's some free advice.

Fred is a very experienced attorney and has been in practice in the Ontario area for a number of years. He has a great deal of experience of dealing with the IRS and "distressed" clients and "distressed" preparers.

Fred completed his undergraduate work at the State University of New York; his law degree from the University of San Fernando Valley College of Law; and two graduate degrees (MS in Taxation and Master of Laws in Taxation) from Golden Gate University. He is been admitted to US District Courts in Georgia, California, and New York. He has been in private practice since 1979 and is the attorney of record in six appellate matters. He also has taught a variety of classes at Golden Gate University School of Law and UCR's extension program as well being affiliated with a number of professional organizations.

Join us for a worthwhile evening on a timely topic.

PRESIDENT'S MESSAGE

Connie Bracher, EA, Inland Empire Chapter President

Question: Why did Pilgrims' pants always fall down?

I attended one of the best seminars I have ever attended yesterday – The Hot Topics Seminar! For those of you that were there, you know what the others missed. Vicki Mulak, EA, spent the first four hours of the day enlightening us with more foreclosure and bankruptcy updates. With the economy being what it is, we need to learn all that we can to assist our clients, and Vicki armed us well. I just wished my head could hold all the information that hers holds - but she did leave us with a syllabus for our reference. The afternoon was full of information from the IRS and FTB, with Amy Smith and Dory Curran, representing the IRS, and Steve Sims representing the FTB. Lots of laughs were generated from Steve Sims, and it continued with Lavar Taylor, Esq., surprising me with his wit and humor. Steve Davis, EA, emceed the event in his usual grand style and Kim Weisham was her usual hostess with the mostess self! All in all, I would like to give Paul Chatham, EA, his Committee, and all of the above thanks for a job well done! I look forward to this being a continuing annual event.

We've had some really great education this year with more still on the horizon. I recommend that you attend the next two dinner meetings which will feature Attorney Fred Cohen for November and Enrolled Agent Sherrill Gregory for December. The IRS Practitioner Seminar will be held on January 13th at the Hilton Hotel. In addition, you have all the tax updates and our CSEA Legislation Day coming up. Check out the Calendar on the back page of this Newsletter for all the events. Any and all of them are worth investigating, and will be of value in your practice.

So, why do Pilgrims' pants always fall down? Answer: Because they wore their belt buckles on their hats!

It's my way of saying Happy Thanksgiving! This is the day the Pilgrims' gave thanks for all their Blessings, and it is our Day

to reflect on all the Blessings we've been given. While you're at it, please give a special "thank you" to all our troops who have helped to make this day special and this Country great.

Update from the Board of Directors

Pat LaRue, EA, Secretary

At the October 13 Board Meeting reports were heard from various committees and the Treasurer's Report was given.

Paul Cheatham EA announced that the "Hot Topics" Seminar was set. There was still space available for any last minute attendees and several of the Board members volunteered to contact other EAs in the area to invite them to attend. The Board may look into a different pricing structure for future years for those persons who want to attend just a portion of the seminar.

Connie Bracher EA showed the flyer developed to promote the Practitioners Seminar scheduled for January 13, 2011. This will be published in the upcoming Newsletter.

Clara Barrett EA had the application form for those persons interested in being included as a Subscriber to the Inland Empire PIA Publicity Campaign.

Paul Cheatham EA gave a report on the recent State Liaison Meeting in Sacramento. Pam Jipp EA and Joel Hendricks EA reported on their first experience attending a State CSEA meeting. Both reported positive experiences and a new appreciation for what CSEA does.

The Board has a new member. Vic Morel EA was elected to fill the remaining vacancy on the Board. Thank you Vic for your willingness to step forward.

Kim Kastl EA who currently serves as the President of CSEA was a guest at the Board Meeting. She fielded questions from Board members and later was our speaker at the General Meeting. She encouraged everyone to attend the 2011 Annual Meeting to be held in the San Gabriel Valley next June.

The next Meeting of the Board of Directors will be held on November 10, 2010 at the Hilton Hotel in San Bernardino.

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CHAPTER NOTES

Welcome

NormaRae Hill, EA, Chair

Valerie McNevin in Temecula and Elaine Perkins in Palm Springs have joined the Chapter as Professional Associates in September. We welcome them and support their growth as associates of the Society and our Profession.

PIA Publicity Campaign 2011

Clara Barrett, EA, PIA Chair

Subscriptions for the 2011 Publicity Campaign are well underway. The top slot in Beaumont, Corona, Crestline, Diamond Bar, Hemet, Moreno Valley, Ontario, Redlands, Riverside, San Jacinto, Upland, and Victorville has already been subscribed. Get your Form in to be the subscriber in the top slot of your community or City.

Topics for the Tax Informational Releases have been scheduled for December through April of the Filing season. These are being prepared for publication in the Inland Empire Magazine and the local publications in the various communities throughout the Inland Empire. The Committee is working hard to make this the biggest publicity campaign yet.

Business Retention Committee

Ken Alvarado, EA, Chair

Virtually all of our members of the Inland Empire Chapter of Enrolled Agents are in practice to one extent or another. Yet, to date we have about 7% of our membership, or 13 people, who have signed up for this potentially very valuable membership benefit. There is strength in numbers and our two county Chapter may be the largest geographically in the country. We need more members to sign up in order to better serve our own. The small sacrifice of time to aid a colleague in need will be greatly outweighed by knowing that, if you find yourself in a situation of need, your colleagues will be there to help. I ask everyone to consider this great membership benefit. Please email me at: alvaradotaxman@verizon.net or call me with any questions regarding the Committee or any input you may have at 909-794-2901 Now is the time to get "your ducks in order" before the Filing Season gets underway.

Nominating Committee

Don Stacy, EA, Treasurer

Please take a minute to let the Nominating Committee know what you would like to do in the Chapter for the next fiscal year beginning July 1, 2011. Our Chapter stays strong because of the many leaders who step up to the plate and volunteer their efforts. The Committee's Form is included in the inserts in this issue of the Newsletter. You may circle any position you would like to be considered for, and either give it to Don or FAX to 951-244-0475.

Awards Committee

Ron Uehle, EA, Treasurer

The Committee is starting to look for those individuals in our Chapter who have contributed to the enhancing and/or improving of the status of the organization in general, the Chapter or CSEA. The Awards Chair will accept nominations for the Inland Empire Chapter Enrolled Agent of the Year, The Bill Dunlap Award, and The Inland Empire Booster of the Year Award beginning now and until December 8, 2010. See the Flyer insert in this Newsletter for more details. Peer recognition is one of the forms of compensation for volunteer efforts that, as a Chapter, we can afford to pay. Professional recognition also increases ones value in the eyes of the client also.

Strategic Planning Committee

Pam Jipp, EA, Chair

As we near the end of the year, it is time to reflect on what is ahead for our Chapter for next year. As First Vice President, I look forward to following in the footsteps of those who have come before me in leading our Chapter in the role of President. As I look ahead at what I envision during my term, I start with our Chapter's purpose "To Promote the Professionalism and the Growth of our Members." Keeping this in mind helps me with my vision for the Chapter. Our Chapter must continue to offer quality education to draw members and guests to our dinner meetings as well as seminars we offer. In order to have quality education we need to invite quality speakers that will be speaking on relevant topics that are important to our members. This will be especially challenging next year as OPR yet has not let us in on the requirements for speakers and courses, but we have a Chapter full of members that will be able to meet these challenges.

Our Chapter has a tremendous opportunity this next year to attract new members. With the new requirements being placed on tax preparers, I think our Chapter should be actively recruiting these preparers to become Professional Associates of CSEA and attend our Chapter meetings. As Professional Associates of CSEA, they will benefit by receiving quality education as well as the support of CSEA members to help them with their changing role in the tax community. We all believe that taxpayers deserve knowledgeable and professional tax preparation. Our Chapter also needs to be proactive in guiding the Professional Associates towards becoming EA's. In order to do this I believe that we need to develop a SEE Review Course that will help the Professional Associates down the EA path.

I look forward to next year and am grateful to all the Board Members, Committee Chairs and members of the Inland Empire Chapter that work so hard to make our Chapter successful. The Strategic Planning meeting will be on May 17, 2011 from 10 A.M. – 2 P.M. Location to be announced later.

I welcome any comments and offers of support in developing the growth and professionalism of our members and associates. I can be reached at 760 955-6434 or by email at anhy@aol.com.

Seminars Report

Barbara Robertson EA, Recorder

Brass Tax 1040/540 Tune Up will be held at several locations; December 1, 2010 at the San Bernardino Hilton and on Friday December 17, 2010 at the Ontario Convention Center. Registration is open through the November 10th Chapter Meeting. Return your registration form for this terrific and popular tax update.

Remember our Chapter earns revenue for attendance at these seminars. For more information or a list of other dates and locations for Brass Tax call Barbara Robertson, EA at 909-466-7466.

QUICKFINDER I am pleased to announce that through the October meeting the following members have earned both a 1040 Quickfinder and a Business Quickfinder for attending all six meetings: S Adrade, C Barrett, C Bracher, D Dekoekkoek, K Dunn, R Franke, J Hendricks, J Kincaid, P LaRue, D Martin, V Morel, O Pagan, D Stacy, and S Tressler.

Members attending five meetings and who have earned the 1040 Quickfinder are: K Alvarado, P Cheatham, S Davis, N Hill, P Jipp, J Kropf, B Robertson, E Sen, R Uehle, J Vine, and G Watson. Attending November and/or December meeting will qualify you to receive a Business Quickfinder also.

Members attending four meetings who still have time to earn either one or both books are: R Abril, G Duncan, P Ellena, M Johnson, D McAllister, J McReynolds, M Mercer, L Smith, and K Stroschein,

Members attending three meetings who still have time to earn the Quickfinder are: B Barnes, M Capparelli, T Jauregui, F Persina, M Seely, J Skelton, and D St Martin,

For those of you who will not qualify for your free QUICK FINDER or would like to order extra copies for your office at our reduced rate, I will be taking orders at the November meeting for placement of the order on November 11. Any questions or if you wish to place a special order call Barbara at (909) 466-7466.

Practitioner Seminar

Hear directly from IRS representatives about policies and procedures that impact you and your clients. Learn how to maximize IRS resources to increase your value to your clients, and earn up to 7 hours of CPE. Cost includes handouts, continental breakfast, lunch and refreshments.

Get the latest including:

- Return Preparer Initiative - What you need to do to prepare for the 2011 filing season
- Taxpayer Advocate Service - How we can work together to help your clients!
- Collection and Examination Updates
- Modernized e-File & e-Services

With all the changes in tax law and administration taking place, this is a very cost effective Seminar. Also, spread the word with other preparers in your office and community. Attendance at the Seminar at the San Bernardino Hilton is one of the major revenue sources of the Chapter. Help to keep your practice current and the Chapter strong.

Mark Your Calendars!!

Wednesday, November 10, 2010

Chapter Meeting — "OUR CLIENTS, TAXES, AND BANKRUPTCY"

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

Dinner choice of Vegetarian Plate or Roasted Turkey Dinner, Green Salad and Pumpkin Pie Dessert

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

November 4 & 5, 2010

Wednesday, November 10, 2010

Tuesday, November 30, 2010

Wednesday, December 1, 2010

Wednesday, December 8, 2010

Friday, December 17, 2010

Friday, January 7, 2011

January 8-9, 2011

ClientWhys Seminar 2010 1040 Review & Update Ontario Hilton

Chapter Meeting: *Bankruptcy & Business Taxes*, Attorney Fred Cohen

Brass Tax "1040/540 Tune Up", Monrovia, Courtyard by Marriott

Brass Tax "1040/540 Tune Up", San Bernardino Hilton

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

Brass Tax "1040/540 Tune Up", Ontario Convention Center

CSEA Legislative Day, Sacramento, CA

CSEA Board Meeting, Sacramento, CA

Thursday, January 13, 2011

Wednesday, May 11, 2011

May 10-12, 2011

June 2-4, 2011

Wednesday, June 8, 2011

June 21-24, 2011

CSEA Tax Practitioner Seminar, San Bernardino Hilton

Chapter Meeting: Attorney Dean I. Friedman

CSEA Super Seminar, Bally's, Las Vegas, NV

CSEA Super Seminar, Grand Sierra Resort & Casino, Reno, NV

Chapter Meeting:

CSEA Annual Meeting, hosted by San Gabriel Chapter, Southern California

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 jkincaidea@gmail.com or 951-204-4882.

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 Fax 951-687-1872 or attach to an email and send to: jkincaidea@gmail.com. All information must be received by 4 pm Friday preceding the monthly meeting to receive the lower rate.

Become a Subscriber to the
PIA 2011 Publicity Campaign.
Sign up Now.

Become a member of the Business Retention
Committee. Contact Ken Alvarado EA at
909-794-2901 or alvaradotaxman@verizon.net

Register for Brass Tax 1040/540
Tune Up. Special Members
sign-up extended to
November 10, 2010

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 Jackie Kincaid, EA; 5924 Mt View Avenue; Riverside, CA 92504. Editorial Board: Connie Bracher, EA; Deborah St Martin, EA; Clara Barrett, EA.



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Inland Empire Chapter CSEA

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