

PRESIDENT'S MESSAGE - JULY 2008

David De Koekkoek, EA, President

"Summertime, And the livin' is easy" should be our tune this time of the year, but somehow "the easy" part has not happened yet in our office in Ontario. We do need some time to re-charge our batteries after the drain of filing season. After listening to a few telephone greetings of other tax offices, we decided to shorten our hours for the summer. We are now going home before dark. One of the messages I listened to stated that *"our current office hours are Monday, Tuesday and Wednesday from 10:00 a.m. to 5 p.m. and we are closed from 12:30 to 2:00 p.m. Please call back during office hours. This machine does not take messages."* Click. How's that for "livin' easy"!

The local Chapter uses this time of the year to re-charge and re-organize itself, install new officers and board members and plan for the year ahead. Over this past month as I have prepared to serve as your president for the coming year, I have been contacting a number of people to assist, in one way or another, in the running of the Chapter. During this time, three things have impressed me greatly:

- 1) The number of different events and functions that the Chapter engages in;
- 2) The willingness of so many people to step up to the plate to make those events and activities happen; and
- 3) The competency and promptness these people have already shown.

Thank you to all who have agreed to be committee chairs, officers, directors and assistants.

Our most visible activity is the monthly education program that about 40 to 50 of the Chapter members regularly attend. These 2-hour continuing education sessions are basically offered at cost. This month's topic is like the weather—hot!!! **Foreclosures!** Clients are already asking about it and, if you are like me, I learn best when the urgency is the greatest. Join us for a valuable session on foreclosures with Lee Reams, EA, CEO of Client Why's. In addition, Connie Ferrell, EA, CSEA president, will be visiting our Chapter and speaking to us about **passive losses**. Be sure to sign up early for this meeting.

However, even if you do not attend Chapter meetings, there are a number of other benefits you receive from membership. The most notable benefit, I believe, is the promotion of the "Enrolled Agent" as **the tax professional**. There is a steady increase in the public's awareness of "EA's" because of

local, state and national efforts to promote who and what Enrolled Agents are. This helps all of us. Access to sponsored seminars and materials is another benefit. If you have never been to a Super Seminar, you owe it to yourself to go. And there is the benefit of associating with other professionals. Ideas for practice management and problem cases are always valuable.

The Chapter is again offering the prepayment option for the 8 monthly meetings. The cost is \$250 and it covers the July-December, May and June meetings. This is a saving of \$40 from per meeting costs. However, the greatest benefit is that you are automatically confirmed for all meetings, and only have to call if you are not coming. Bring your check for \$250 to the July meeting and get signed up for the year.

The **Quickfinder Attendance Reward** program is again in place. Earn a free 1040 Quickfinder by attending 5 meetings, plus a business Quickfinder if you attend six.

Our **IRS representation seminar** will be held in **October** this year. We believe this will be a better time for members to attend and it will give Steve Davis a little more time to address to hot topics in tax representation.

Enclosed in this Newsletter are **flyers and registration forms for Brass Tax and Client Whys seminars** this fall and winter. Both of these firms provide first rate seminars. By using these forms (or the ones emailed to you by our Chapter) our chapter will earn some much needed funds without it costing you anything. Sign up soon and take advantage of the early bird discounts!

Finally, I want to call attention to our web-site at www.ietaxpro.com. The tax research center portion of the web-site is a great resource for both you and your clients. There are 18 topics of interest including Tax Law Changes, Death, Divorce, Eldercare and Retirement Planning. A second portion of the web-site is the "Find an Enrolled Agent in your area" which is self-explanatory, but definitely a benefit to all members. Continuing Education, Chapter information and links to other tax-related sites will be uploaded in the near future. . Keep checking to see what is being added over the next several weeks. If there is something you would like to see, contact Joe Ligorì at joe@ligoritax.com. Joe is our new web-site editor, and will be working to bring the web-site up to speed and keep it current. Bookmark it!

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July Program

Pam Jipp, E.A., Education Chair

This month is a treat as we have not one but two speakers at our monthly dinner meeting. Connie Ferrell, EA will be presenting Passive Activities with At Risk Rules. Connie is currently First Vice President of CSEA, and will serve as President of CSEA 2008-2009. She has been an enrolled agent since 1989 and NTPI Fellow since 1991. Connie has worked in tax preparation, bookkeeping, and representation for over 40 years and is President of Flavin and Associates Inc.

Our second speaker Lee Reams, EA will be speaking on foreclosures. Lee is the CFO and Chief Technical Officer for ClientWhys, Inc. Educated as an engineer, with a Bachelor's Degree in Mechanical Engineering, Lee left his engineering career in 1975 to make taxes a full time career. He is a Past President of the San Fernando Valley Chapter of Enrolled Agents and Past Director to the California Tax Education Council (CTEC) for the State of California. His tax practice and technical articles are regularly published in the NAEA Journal a publication of the National Association of Enrolled Agents and he is a frequent speaker for society chapters.

In 1978 Lee founded IPS which evolved into ImageOne Inc. one of the largest suppliers of supplies and marketing materials to tax practitioners in the nation. In 2005 Lee sold ImageOne but retained the newsletter, website, CPE, marketing and seminar businesses under the name ClientWhys. Lee also operates a technical research service for members of ClientWhys "Total Practice" membership group which sharpens his technical skills. Lee is also the author of the Fall Update & Review and the Last Minute Update text books used in continuing education seminars for CPAs, Enrolled Agents and tax Practitioners. He also authors tax related materials and Continuing Education courses.

Both topics have been requested by many members and we are pleased to be able to have two such knowledgeable speakers on these important subjects.

Update from the Board of Directors

Norma Rae Hill, E.A., Secretary

At the June Board meeting reports were heard from the Treasurer, Scholarship and Finance & Budget committees.

Jerry Watson EA reported that our two Scholarship applicants received 100% and 90% of their educational requests.

Don McAllister, EA reviewed with the Board the initial draft of the 2008/2009 budget and discussion was had on various points.

Dave DeKoekkoek, EA stated that he would continue as Web Site Development Chairman until someone else could be found to oversee the continued development of the web site. Anyone with talent or interest in that area should contact the Board.

Treasurer Judy Kropf, EA informed us that the Hilton has raised their fees and that they would be going up again in January. The board approved increasing meeting fees to cover the additional costs.

Steve Davis, EA was approved to enter into a contract with Hilton for the Representation Seminar to be held October 21, 2008 and \$3,200 was allotted for Seminar expenses.

The Board approved sending Jerry Watson, EA and Connie Bracher, EA to the NAEA Annual meeting in Baltimore.

The next meeting of the Board of Directors will be held on July 9, 2008, 4:00 p.m. at the Hilton Hotel in San Bernardino.

Meet the Board

Editor—During the next several issues, we will print the responses of the new Board to a set of questions that were posed in an effort to increase the communication between the membership and the leadership of the Chapter.

Don Stacy is the newly elected 1st Vice President and Chapter Representative to CSEA. As such, he also chairs the Chapter's Strategic Plan Committee that is the instrument that directs the Chapter's efforts for next year. At the State level he has been appointed chair of the Budget and Finance Committee. Don has been in practice since 1984. His office is located in Canyon Lake. During the filing season it prepares almost 1,000 returns. In addition he does about twenty audits per year and too many collection cases to think about. He welcomes audit referrals and will not "steal" clients. He has three employees and a "pug" working in his office. His other professional experience was a Controller and CFO for Southern California corporations and a West Coast divisional controller for a national company. In his vision for the Chapter he would like to see it break the 200 member ceiling and have most of the members attending Chapter meetings. He sees the meetings as a vital part of EA's continuing education and interest in the field of taxation. Members are invited to discuss concerns of professional ethics, membership issues and benefits, and legislative affairs.

Paul Cheatham is serving his second year of his term as the Chapter's CSEA Director on the State Board. Since 1986 he has been self-employed full-time as an 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 which resulted in 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 CE at the meetings. He would like to see new ways to provide high-quality CE at affordable prices. He believes by that by building on a foundation of education, all the other good things that we want for the Chapter will follow.

Pam Jipp, EA is a Director on the Chapter's Board and continues to serve as Education Chair. She has been preparing taxes since 1998 and became an EA in 2003. Currently she is employed at Top of the Line Tax Service that has four offices in Southern California. The staff includes 3 EA's and 2 CTEC preparers. Her vision for the Chapter is to provide exceptional education to our members in order to support their ability to grow their practices and promote the professionalism of EA's. She is anxious to discuss with members their interest in regards to Chapter Education.

Awards Committee Recognition

Don McAllister, EA, Chair

At the June 11th Chapter meeting, the Inland Empire Chapter of Enrolled Agents recognized the following individuals who having contributed

to the enhancement and/or improvement of the status of the Chapter:

Diane Hald was honored as the Booster of the Year for her contributions to the administration, operation, and smooth functioning of our Chapter retreat and promoting the EA designation in Connie Bracher's office in Crestline.

Tennie Becker, EA was honored with the Jim Kannouse Award for her long time contribution to the Chapter and CSEA. For the past few years, she has chaired the Scholarship Committee and has consistently helped applicants receive awards from the CSEA Scholarship Program. Tennie attention to detail has always been available to help clean up various situations in the administration of the Chapter.

Judy Kropf was honored as the Inland Empire Chapter Enrolled Agent of the Year for her significant contributions in improving the status of our Chapter, while working in the area of the Chapter's Finances.

Gerald Watson was honored for his outstanding commitment and leadership of the Inland Empire Chapter of Enrolled Agents, while severing as the 2007-2008-program year President.

To all of the Honorees we thank you for all the time and labor you have put into the success of the Inland Empire Chapter this past year.

Outgoing Treasurer's Report

Judy Kropf, EA, Treasurer

I want to thank everyone for all the support you have given me for the past two years. Without everyone's help I would not have achieved keeping the books and the administrative tasks of our Chapter meetings in order.

Now the cost news: we have to increase all the costs this year. Due to the increases given to us by the hotel, the cost for the prepayment option for 8 monthly meetings (July 2008 through June 2009) will be \$250.00. The cost per monthly meetings from July, 2008 through December, 2008 will be \$35.00 and the cost per meeting for May, 2009 and June, 2009 will be \$40.00. We also have to increase non-members to \$40.00 for six months and \$45.00 for the last two months. Another increase will be for anyone not emailing or calling in by Friday at 4:00pm will be charged an additional \$10.00. The Board at its June Meeting approved these changes.

The change of time to call has to do with the policy of the Hilton. In the contract with the Hilton, it is required for us to call at least 72 hours (three business days) before the event, we must inform them, in writing, of the exact number of people who will attend the event and is not subject to reduction. There is an additional fee when we give them an additional number after that time. That is why there will be a \$10.00 difference if you call, email or just show up after the Friday at 4:00pm preceding the meeting. If you have called, emailed or paid in advance and you are not able to be there at the meeting, please let us know right away because we will have to pay for you even though you are not there. If you have made a reservation and have not paid in advance and have not cancelled, we will have to bill you.

You will be contacting your new Treasurer, Kathy Dunn, EA. For all the phone calls her number is (909) 935-5433 and her email is Kathy@ctbpro.com Please try to help her in making this a smooth transition, by submitting your RSVP no later than Thursday, July 3 @ 4:00 due to the July 4th holiday.

QUICKFINDER

ATTEND OUR MEETINGS!! ENJOY COMRADESHIP WITH YOUR PEERS AND SAVE YOURSELF SOME MONEY!! MEMBERS ATTENDING 5 OR MORE MEETINGS FROM MAY 2008 THROUGH DECEMBER 2008 WILL RECEIVE A FREE 1040 QUICKFINDER. THOSE ATTENDING SIX MEETINGS OR MORE WILL IN ADDITION RECEIVE A FREE BUSINESS QUICKFINDER

Mark Your Calendars!!

Wednesday, July 9, 2008

Chapter Meeting — Connie Ferrell, EA, President of CSEA on Passive Activities, 1 hour;
Foreclosures, Lee Reams, EA, ClientWhy's, 1 hour

Wednesday, August 13, 2008

Chapter Annual Meeting — Election and Installation of Board

Sunday, August 31, 2008

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

Wednesday, September 10, 2008

Chapter Meeting

Wednesday, September 10, 2008

Early Registration for ClientWhy's Update

Wednesday, October 8, 2008

In order for us to receive \$25 per registration, must use Chapter form

Tuesday, October 21, 2008

Brass Tax Tool Box Ontario Convention Center

Thur/Friday November 6-7, 2008

Chapter Meeting Selvi Stanislaus, Executive Director of the FTB

Wednesday, November 12, 2008

Chapter Meeting, Lynn Freer, EA, Spidell.

Monday, November 24, 2008

Advanced Representation Seminar, San Bernardino Hilton, 8am-5pm

Wednesday, December 10, 2008

ClientWhys Update, Ontario Hilton

Wednesday, December 17, 2008

Chapter Meeting

Wednesday, May 13, 2009

Brass Tax Update San Bernardino Hilton

Wednesday, June 10, 2009

Chapter Meeting, Tax Resources with Quickfinder

Brass Tax Update Ontario Convention Center

Chapter Meeting

Chapter Meeting

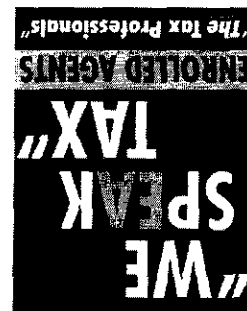
Due to Hotel Policy dinners will not be provided without prior reservations. Seminar cost is \$35 for members (\$40 for non-members and guests) for reservations made by 4 p.m. on Thursday (due to the holiday) preceding the program. Late reservations are \$10 additional and can be made until 12 noon Wednesday. Walk-in's to Seminar is \$45.

RSVP TO: jkropf@2data.net or 951/845-9345. THANK YOU

Meeting Location: Hilton Hotel San Bernardino, 285 E. Hospitality Lane

Here's a reminder that the CSEA Scholarship Auction is up and running from now until July 15, 2008. You can access the site at www.csea.org/auction for browsing, registering, bidding, and donating. You can also donate items directly to Cliff Weimer at cweimer@csea.org. Remember, ALL PROCEEDS benefit the CSEA Education Foundation, and donations are now TAX DEDUCTIBLE because the CSEA Education Foundation has filed for a 501(c)(3) tax exemption.

Chapter IDEAs 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 Richard Franke, EA, Editor; 4251 Park Avenue; Hemet, CA 92544. Editorial Board: Connie Bracher, EA; Deborah St Martin, EA; David De Koekkoek, EA.



First Class Mail

Chapter IDEAs

Inland Empire Chapter CSEA

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