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# Mission Society of Enrolled Agents

## June Newsletter & Upcoming Events

**Happy New Year and Welcome to our 2009/2010 Fiscal Year!**

### **PRESIDENT'S MESSAGE**

I would like to start by thanking all of the members for electing me. I am truly honored and will do my utmost to serve Mission Society of Enrolled Agents to the best of my ability.

I have often thought about the benefits I receive from belonging to Mission Society of Enrolled Agents. What I have found personally, the most important benefit is networking with my fellow members and finding out that I can learn a lot from each and every one of them. We are all very fortunate to have practices in a geographic area that is full of brilliant tax minds. Over the past 20 years of preparing taxes, I have found that there are areas of taxation that I like and excel in as well as areas that I simply do not. With my attending the monthly meetings, education events, and socials, I have had the benefit of meeting many other Enrolled Agents who practice in areas that I do not. Always wanting to do my best for each of my clients, these contacts enable me to refer them to someone that I know and feel confident that the taxpayer will be in the best possible hands.

I want to challenge each and everyone one of you members to come to meetings, SIG groups, education events, and socials to meet the brilliant minds in our chapter and develop your referral base. We all pay dues to belong and we all want to get something out of it; it is entirely up to us individually to make that happen. I look forward to seeing you in June at the next meeting.

Sincerely,

Alan Pinck, EA  
MSEA President



## Mission Society of Enrolled Agents

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### Board of Directors

<b>Alan Pinck, EA</b>	<b>President</b>
<b>Jessie Singh, EA</b>	<b>President Elect</b>
<b>Margy Dunn, EA</b>	<b>Vice President</b>
<b>Russell Barnett, EA</b>	<b>Secretary</b>
<b>Sam Trinh, EA</b>	<b>Treasurer</b>
<b>Randy Warshawsky, EA</b>	<b>Immediate Past President</b>
<b>James Houston, EA</b>	<b>CSEA Director</b>
<b>Robert Davi, EA</b>	<b>Director</b>
<b>Cynthia Leachmoore, EA</b>	<b>Director</b>
<b>Marie Sairy, EA</b>	<b>Director</b>
<b>Vanessa Anderson, EA</b>	<b>Director</b>
<b>Jill Mendenhall, EA</b>	<b>Director</b>
<b>Edward Sutton, EA</b>	<b>Director</b>
<b>Myra Thompson, EA</b>	<b>Director</b>
<b>Connie Wei, EA</b>	<b>Director</b>

## **San Jose Lunch Meeting**

**Speaker:** Claudia Hill, EA, MBA

**Topic:** Saying Goodbye to Problem Clients

**Where:** Maggiano's Little Italy  
Santana Row  
3055 Olin Ave.  
San Jose, CA 95128

**When:** June 16, 2009

10:00-11:30 Board Meeting (guests welcome)  
11:30 - 12:00 Mingle & Network  
12:00 - 12:30 Lunch Announcements  
12:40 - 1:30 Various

**CPE:** 1 hour of NAEA

**Sign up by 5:00 pm, Saturday, June 13, 2009 to be eligible for the early bird price of \$25.** You can also register at the door for \$30. (Once registered, unless registration is cancelled prior to cutoff, payment will be expected whether luncheon is attended or not.)

[Click Here to Register for Lunch Meeting](#)

### **MISSION SOCIETY OF ENROLLED AGENTS BOARD MEETING MINUTES**

San Jose, CA  
April 21, 2009

President Randy Warshawsky, EA, called the Mission Society of Enrolled Agents regular Board Meeting to order at 10 a.m. Secretary took the Roll call and the following Board members were present:

President -	Randy Warshawsky, EA
President Elect -	Alan Pinck, EA
Vice-President -	Jaswant S. Jessie, EA
Immediate Past President -	George Pan, EA
Treasurer -	Russell Barnett, EA
Secretary -	Sam D.Q. Trinh, EA

CSEA Directors:	James Houston, EA
	Margy Dunn, EA

MSEA Directors -	Cynthia Leachmoore, EA
	Jill Mendenhall, EA
	Marie Sairy, EA

Myra Thompson, EA  
Robert Davi, EA

Visitor(s) - Connie Ferrell, EA, CSEA President, Connie Wei, EA, Diana Liffengren, Don Walter, EA, Ed Sutton, EA, George Vogel, EA, Ilse Beck, EA.

Board Member(s) absent - Arnold Pinck, EA, Torie Charvez, EA

The Board reviewed and accepted the Minutes of the January 20, 2009 meeting as presented.

#### **TREASURER'S REPORT**

Treasurer Russell Barnett, EA presented the financial reports for the periods ending from 1/1/09 through 3/31/09 and the revised reports for fiscal year ending 6/30/08.

The board also reviewed MSEA's tax returns for fiscal year ending 6/30/08 prepared by Russell Barnett, EA.

#### **PRESIDENT'S REMARK**

President Randy Warshawsky, EA stated that this tax season was stressful and a tough one. He has warned the board needs to be careful in dealing with the MSEA's financial status and budget for the upcoming fiscal year. Especially, MSEA has been operating in the "red".

#### **COMMITTEE AND ORGANIZATION REPORTS**

The board reviewed all committee reports represented.

#### **UNFINISHED BUSINESS**

Russell Barnett, EA will work on a pdf fill-able form for event budget for posting on MSEA website.

#### **NEW BUSINESS**

The board went into a closed session.

#### **ADJOURNMENT**

There being no further business, President Randy Warshawsky, EA adjourned the meeting at 11:10AM. The next meeting will be, on May 19, 2009, at Maggiano's Little Italy, in San Jose, California.

Respectfully Submitted,  
Sam D.Q. Trinh, EA  
Secretary of MSEA

[Membership Meeting](#)

Hello Everyone,

I would like to schedule a membership committee meeting for June 24, 2009 at Mama Mia's located at 200 E. Hamilton Ave., Campbell, CA 95008. The meeting will start at 12:00pm and I would like to invite any MSEA member to participate. Please let me know by June 15, 2009, if you will be able to attend. I look forward to meeting with all of you and hearing any suggestions you may have for increasing MSEA membership.

Vanessa Anderson, EA  
Membership Chair  
408-296-7087  
hhtaxv@aol.com

### Workshops and Seminars

MSEA is proud to offer a line-up of workshops and seminars that meets the needs of tax professionals. The Education committee consists of 14 members dedicated to making complicated tax material understandable.

If you are interested in helping provide this service, please join our Education committee Wednesday, June 3, 9:30am at Telesky Financial Services, 2095 Park Ave., San Jose.

Myra Thompson, CA  
Committee Chair  
(408)723-2402  
myra.j.thompson@intel.com

### Special Enrollment Exam (SEE) Preparation Classes

#### **Monterey Location:**

**Bay Tax Service  
203 Calle Del Oaks  
Del Rey Oaks, CA 93940**

**Parts 1, 2, 3: Classes start June 13. Early bird deadline is June 6, 2009 for discounted price of \$575 for all three classes. Click the link below for more information on pricing and how to register for the Monterey classes.**

[Class schedule and information](#)

### **San Jose Location:**

**Telesky & Hernandez  
2095 Park Ave.  
San Jose, CA 93946**

**Parts 1, 2, 3: Classes start June 27. Early bird deadline is June 6, 2009 for discounted price of \$575 for all three classes. Click the link below for more information on pricing and how to register for the San Jose classes.**

### **[Class schedule and information](#)**

Classes fill up quickly so register today!

### **June Calendar of Events**

- June 2 Sig Group - Holders Inn, S De Anza Blvd., San Jose, 11:30am
- June 3 Sig Group - Effie's, 331 W Hacienda Ave., Campbell, 11:45am
- June 3 Education Committee Meeting - 2095 Park Ave., San Jose, 9:30am
- June 5 Mini Workshop - Monterey- Choice of Entity, 9:30-1:30pm, Bay Tax Service, 203-B Calle Del Oaks, Del Rey Oaks, CA 93940
- June 11 Sig Group - Marie Callender's, 620 Blossom Hill Rd., S J, 11:30am
- June 13 SEE Class, Monterey, Part 1
- June 15/16 C-Star, San Diego, CA
- June 16 MSEA Board Meeting, 10:00am-11:30am, Maggiano's, S. J.
- June 16 MSEA Luncheon Meeting, 11:30am-1:30pm, Maggiano's, S. J.
- June 23-26 CSEA Annual Meeting, Torrance, CA
- June 24 Membership Meeting, 12:00, Mama Mia's, 200 E. Hamilton Av., Campbell
- June 27 SEE Class, San Jose, Part 1
- June 27/28 CSEA Board Meeting, Torrance, CA

For other events throughout the year, visit our website at [www.missioneas.org](http://www.missioneas.org).

### **Take Me Out to the Ball Game!**

Join your fellow EA's along with their family and friends for an exciting evening of baseball and fireworks on August 5th, 2009! Tickets are available from \$30 each and include a BBQ dinner, great seats to see the hot San Jose Giants take on the Visalia Rawhide, and a great fireworks show afterward! A beer can be included with your dinner for an

additional \$5. The game starts at 7 p.m. but gates open at 5:30, so there will be plenty of time to eat and socialize before the game starts. Please contact Russell Barnett, EA by email at [Russell@barnettaccounting.net](mailto:Russell@barnettaccounting.net) or by phone at (408) 293-8880 for more information or to place your reservation. Tickets are limited so don't wait!

## Questions?

Call the Mission Society office at 800-832-6732 or email to [office@missioneas.org](mailto:office@missioneas.org).



Mission Society of Enrolled agents is a chapter of the California Association of Enrolled Agents [www.csea.org](http://www.csea.org). California Society of Enrolled agents is a chapter of the National Society of Enrolled Agents [www.naea.org](http://www.naea.org).



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