

Mission Society of Enrolled Agents

May Newsletter & Calendar of Events

President's Message

This is the last President's message for me to write. It has been two years since I took office and I have seen a lot of changes. The housing bubble burst, the economy has been on a roller coaster, and I am expecting drastic tax law changes in the near future.

What has happened with MSEA in the last two years? We have been affected by the economy and have seen our costs soar as we try to keep events affordable for our members to attend. In doing so, we have been running the organization in a deficit. As you all know, this can only go for so long before changes will need to be made. We used to be able to count on education events to help with the bottom line.

For Mission Society we are committed to providing education to our members. We ask that you consider attending the education we provide. Soon you will get information from our education committee on what we will be offering this summer. They are endeavoring to offer classes in both the San Jose/Santa Clara area as well as in the Monterey area. If you have any suggestions on classes you would like to see offered, please get those to our incoming President Alan Pinck at ataxkid@pacbell.net.

I hope that you find MSEA in as good, if not better, shape now as it was two years ago when I took office. It has been a pleasure serving you as President, and I look forward to the best position on our Board of Directors - "Immediate Past President".

Thanks,
Randy Warshawsky, EA



Mission Society of Enrolled Agents

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Board of Directors

Randy Warshawsky, EA	President
Alan Pinck, EA	President - Elect
Jessie Singh, EA	Vice President
Sam Trinh, EA	Secretary
Russell Barnett, EA	Treasurer
George Pan, EA	Past President
James Houston, EA	CSEA Director
Margy Dunn, EA	CSEA Director
Myra Thompson, EA	Director
Jill Mendenhall, EA	Director
Torie Charvez, EA	Director
Robert Davi, EA	Director
Arnold Pinck, EA	Director
Marie Sairy, EA	Director
Cynthia Leachmore, EA	Director

San Jose Lunch Meeting

Speaker: Various

Topic: Annual meeting, nominations, elections,

installation of officers

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

When: May 19, 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: None

Sign up by 5:00 pm, Saturday, May 16, 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](#)

Calendar of May Events

- | May 5: Sig Group - Holders Inn, S De Anza Blvd., San Jose, 11:30am
- | May 6: Education Committee Meeting - 2095 Park Ave., San Jose, 9:30am
- | May 7: Sig Group - Everything But 1040, 2095 Park Ave., San Jose, 12noon
- | May 13: Tell-All Workshop Taking EA Exam CSEA web cast & phone, 11am-12 noon
- | May 14: Sig Group - Marie Callender's, 620 Blossom Hill Rd., San Jose, 11:30am
- | May 18-23: CSEA Super Seminar - Las Vegas, NV
- | May 18-30: CSEA Super Seminar - Reno, NV
- | May 19: MSEA Board Meeting, Maggiano's Santana Row, 10:00am-11:30am
- | May 19: MSEA Luncheon Meeting, Maggiano's Santana Row, S.J., Election of Officers, Installation, & Awards, 11:30am-1:30pm
- | May 20: Sig Group - Effie's, 331 W Hacienda Ave., Campbell, 11:45am
- | May 26-27: CSEA Board/Committee Meeting - Reno NV

SIG Groups are small groups of members getting

together to discuss tax issues. They are a great way to network. Some groups specialize while others are open to all tax questions. Contact information for each group is on the website at www.missioneas.org.

Upcoming Education Events in San Jose & Monterey

- | Special Enrollment Examination Classes starting June 13th. More details are forthcoming.
- | August 20th - All day seminar:
- | "Mortgage Interest - Doing It Right the First Time" & "Debt Relief"
- | 7 Mini seminars - Beginning mid August
- | Basic 60-hour Income Tax Course - late summer
- | Ethics class - date to be determined

Welcome New Members

1. Mukat Aggarwala, EA - Joined 1/1/09
2. Spiro Lougaris, EA - Joined 1/29/09
3. Virginia Bautista, Prof Assoc - Joined 1/30/09
4. Kristopher Town, Prof Assoc - Joined 3/17/09
5. Virginia Davi, CPA, Prof Affil - Joined 4/7/09

BOARD MEETING MINUTES

January 20, 2009

1. President Randy Warshawsky, EA, called the Mission Society of Enrolled Agents regular Board Meeting to order at 10:00AM.

2. Secretary took roll call and the following were present:

Board Members:

- 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

MSEA Directors:

- Arnold Pinck, EA
- Jill Mendenhall, EA
- Marie Sairy, EA
- Torie Charvez, EA
- Robert Davi, EA
- Cynthia Leachmoore, EA

CSEA Directors:

- James Houston, EA
- Margy Dunn, EA

Visitor(s):

- George Vogel, EA,
- Ilse Beck, EA,
- David Hatt, EA and NAEA President,
- Diana Liffengren,
- Connie Wei, EA,
- Don Walter, EA,
- John Oliver, EA and CTEC Director

Board Member(s) absent:

- Myra Thompson, EA

3. The Board reviewed and accepted the Minutes of the December 16, 2008 meeting as presented.

TREASURER'S REPORT

The Treasurer also prepared a new report "Revenue by Class" to allocate appropriate expenditure.

Treasurer Russell Barnett, EA reported that MSEA has a profit in December and collected \$2,230 from the auction during the holiday party.

COMMITTEE AND ORGANIZATION REPORTS

The board reviewed all committee reports represented.

UNFINISHED BUSINESS

The nomination committee will submit the nominations by 4/20/09. An event budget form will be created for committee chair, web master, and newsletter.

NEW BUSINESS

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1. The board went into a closed session.
2. The board has voted and approved the motion moved by PIA to spend up to \$3,000 similar to last year in three theaters including the purchase of Ad materials for future use.
3. MSEA has new fax number using Efax service.

ADJOURNMENT

There being no further business, President Randy Warshawsky, EA adjourned the meeting at 11:29AM.

The next meeting will be, on April 21, 2009, at Maggiano's Little Italy Santana Row, in San Jose, California.

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

[Questions can be directed to the](#)

Mission Society office at 800-832-6732 or via email to office@missioneas.org.



Mission Society of Enrolled agents is a chapter of the California Association of Enrolled Agents www.csea.org. California Society of Enrolled agents is a chapter of the National Society of Enrolled Agents www.naea.org.



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