



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

1475 S. Bascom Ave #206
Campbell, CA 95008
office@missioneas.org

Telephone: (800) 832-6732
Fax: (408) 371-8677
www.Missioneas.org

PRESIDENT’S MESSAGE



Is summer already over? My grandson is back in school and that marks the end for me. Did you get everything done over summer that you wanted to do? If not, get busy you only have a few weeks left.

We are in the midst of changing the webmaster as I am writing this. You will notice that we did not have an August newsletter. I’m not sure what the newsletter or the website is going to look like. We are hoping to have it up to date soon but please bear with us during the transition.

Have you every attended a SIG group? Do you know what a SIG group is? First of all SIG stands for “Special Interest Group” and you will find a list of our SIG groups on our website under meetings. What happens at a SIG group? Each one is run a little differently but the concept is to bring your problem(s) to the group and debate them back and forth. The big topic lately is the mortgage interest audits some members are experiencing.

Make sure you get all that you can get out of MSEA by being active. If you’re not sure how to get active contact anyone on the board and we would be glad to help.

By now you should have gotten our education flyer. There are some great topics that have been arranged to help you in your practice. Please support the chapter with your attendance. You can check them out at <http://www.missioneas.org/education.html>. Check out Educational Opportunities starting on page 6 of this newsletter.

If you ever have a concern with anything with MSEA you are welcome to contact me and I will help or direct you to the right person.

Enjoy what you have left of summer!

Randy Warshawsky, EA
Randy@4taxman.com
(408) 445-1151

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Board of Directors

President	Randy Warshawsky, EA	CSEA Directors	
President Elect	Alan Pinck, EA	Directors 1 Year Term	
2nd Vice President	Jessie Singh, EA	James Houston, EA	Margy Dunn, EA
Treasurer	Russell Barnett, EA	Directors 2nd Year of Two Year Term	
Secretary	Sam Trinh, EA	Jill Mendenhall, EA	Torie Charvez, EA
Immediate Past President	George Pan, EA	Arnold Pinck, EA	Myra Thompson, EA
Contact info: www.missioneas.org/directors.html		Directors 1st Year of Two Year Term	
		Bob Davi, EA	Marie Sairy, EA
		Cynthia Leachmoore, EA	

Lone accountant takes on IRS and wins

http://news.yahoo.com/s/ap/20080824/ap_on_bi_ge/tax_fight_irs_losses

Mutual companies are owned by their shareholders. When mutual life insurance companies went public in the late 1990s and earlier this decade they compensated their policyholders for their loss of ownership. An accountant, Mr. Charles Ulrich, after a 7 year

fight, successfully argued that policyholders paid for their ownership through their premiums and the distribution should be tax-free. The IRS had argued that they had a zero basis in the distribution and the entire amount was taxable. This distribution went out to about 30 million policyholders. The statute of limitations for taxes paid in 2004 ran out for most taxpayers April 15, 2008. The



government has not decided whether they will appeal.

Bulk Requests from Practitioners for Disaster Relief

<http://www.irs.gov/taxpros/article/0,,id=185559,00.html>

This is a web site link to guidance on procedures for practitioners who are located in affected areas who want to self-identify their clients for disaster relief.

Board Meeting Minutes

San Jose, CA
July 15, 2008

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

Roll call was taken.

Following Board members were present:
President Randy Warshawsky, EA, Vice President Jaswant S. Jessie, EA, Treasurer: Russell Barnett, EA, Immediate Past President George Pan, EA, Directors: Arnold Pinck, EA, Jill Mendenhall, EA, Marie Sairy, EA, Myra Thompson, EA, Robert Davi, EA, CSEA Directors James Houston, EA

Visitors: George Vogel, EA

Board Member Absent:

Directors Absent: Torrie Charvez, EA, Secretary Sam Trinh, EA, President Elect Alan Pinck, EA, Margie Dunn, EA

Minutes of the June 17, 2008 MSEA meeting were accepted with corrections.

TREASURER'S REPORT: Presented and reviewed.

COMMITTEE AND ORGANIZATION REPORTS: Were presented.

OLD BUSINESS: Executive Session of Board: No Minutes recorded

NEW BUSINESS:

Motion for Budget for 2008-2009 proposed and passed unanimously.

Motion for Audit / Review proposed and passed unanimously.

ADJOURNMENT:

There was no further business and President Randy Warshawsky, EA, adjourned the Board meeting at 11:40AM.

The next meeting is scheduled for August 19, 2008 at 10:00AM at Maggiano's, in San Jose, CA.

Respectfully Submitted,

Jaswant S. Jessie, EA

MSEA Vice President

On behalf of MSEA, Secretary

Getting To Know You...

James Forrester EA

Jim Forrester began preparing taxes in 1972 when he joined the Tax Corporation of America (TCA) on a part-time basis while working full-time as an Aerospace engineer. In 1977, he took the SEE class, passed the exam and became an Enrolled Agent 11/1978. As an Enrolled Agent he left engineering and became a tax professional.

Transitioning from engineering to taxes was easy for Jim. His area of specialty as an Aerospace engineer was systems integration which required both technical skills and the ability to work well with people. His interest in tax preparation developed when he was a young man observing his father preparing the family's individual tax return. Later after creating an S-Corporation and preparing the tax returns for his engineering consulting firm he realized he would be a better tax consultant than engineering consultant. He moved into an office with another tax professional

eventually purchased that practice and later partnered with Jane Draper to create Draper Forrester. In 2001 he sold the practice (now owned by Dorothy Lang) to work part-time for himself and Sekkel and Associates.

Jim has been a very active member of MSEA. He served on the MSEA Board of Directors for 2 terms, was Vice President and chapter President in 1983/84. It was during his term as President that MSEA incorporated. James also taught a tax course at Foothill College, and the SEE class for MSEA. He received his master's degree in taxation from Golden Gate University in 1987, and is an NTPI Fellow.

Jim was NAEA Secretary, on the NAEA Board of Directors for 1 term and served as the Director of the NAEA Education Foundation. He also served a 2 year term on the IRS Commissioner's Advisory Group (CAG) and has personally observed the impact of having a national membership and its effect on change.

Condolences

The Monterey Satellite group of MSEA lost member Catherine Graham, EA on July 5, 2008 to cancer at the age of 60. Cathy was devoted to her clients and profession to the end, taking time to consult with her clients' new tax preparers by phone to ensure a smooth transition throughout this past tax season. In addition, in true Cathy spirit, she even sent food to the offices of her fellow enrolled agents to keep them going in March and April. She will be greatly missed.

Further Condolences

Judy Bates, wife of Allen Bates EA, passed away in this month. We send our condolences to Allen.

September Anniversaries

09/22/77 Sandra Skillicorn EA
09/22/77 Jack Skillicorn EA
09/21/81 Melinda Meyers EA
09/13/82 Lynn Telford EA
09/10/84 Anthony Bugge EA

09/10/84 Dilip Vyas EA
09/12/84 David Barone EA
09/28/84 Alice Tepel EA
09/04/85 Julianne Mazurek EA CFP
09/30/85 Gregory Piszczatowski EA
09/29/87 Suzanne Buck EA
09/08/93 Sally Kane EA
09/27/93 Robert Goodfellow EA
09/21/95 Midge Dorn EA
09/06/96 Susan Wayne EA
09/16/97 Guy Plummer EA
09/01/98 William Herrington EA
09/08/98 Herbert Nagamine EA
09/08/98 Richard Seldow EA
09/12/01 Ilse Beck EA
09/18/03 Linda Canavan EA
09/28/05 Victoria Charvez EA

Renewing Members

Thank you for renewing our membership with MSEA. You are important to us and we look forward to providing you with the continued educational and networking opportunities that you have come to expect from us.

Orientation Meeting

Find more about the benefits of being a MSEA member

Date: Tuesday, **9/16/08**
Time: 10:30AM to 11:45 AM
Location: Maggiano's Little Italy in Santana Row, 3055 Olin Ave, #1000, San Jose, CA 95128

RSVP: MSEA Office by: **9/11/08**
Phone: 800-832-MSEA (6732)
Fax: 408-371-8677
Email: office@missioneas.org

(Separately RSVP for the San Jose regular meeting)

Calendar of Events

SAN JOSE MEETINGS

3rd Tuesday of the Month at 11:30
Check [Calendar](#) for any change to the date.

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Maggiano's Little Italy in Santana Row, 3055 Olin Ave. #100 San Jose CA 95128.

To RSVP, click this link

<https://www.123signup.com/register?id=tnfjc>

Remember that the price is \$25 by reservation and \$30 at the door. Invitations are sent out by e-vite whenever possible, please RSVP using that system.

PALO ALTO DINNER MEETINGS

Tuesday, September 23

6:00 PM - 8:00 PM

Palo Alto Dinner Meeting

6:00 PM Registration

6:30 PM - 8:00 PM Dinner and Presentation

Speaker: Kent Noard EA

Topic: *Tax Implications of your Client's Investments*

Dinner Fee: \$30 in advance or \$35 at the door.

RSVP: e-vite or contact MSEA office at 800-832-6732

Tuesday, October 28

6:00 PM - 8:00 PM

Palo Alto Dinner Meeting

6:00 PM Registration

6:30 PM - 8:00 PM Dinner and Presentation

Speaker: Morris Miyabara EA

Topic: *Understanding Financial Statements & S-Corp Basis*

Dinner Fee: \$30 in advance or \$35 at the door.

RSVP: e-vite or contact MSEA office at 800-832-6732

November 25 – No Palo Alto Meeting

SIG MEETINGS

September SIGS

Tuesday, September 2

11:30 AM – 12:30 PM

General Tax & Practice Mgmt SIG

Holder's Country Inn

998 S. De Anza Blvd, San Jose

Contact: Sonya Meissner EA at (408) 257-9134

e-mail:sonya_meissner@yahoo.com

RSVP requested

Wednesday, September 3

11:45 AM – 12:45 PM

Tax Support Group

Effie's

331 W Hacienda Ave, Campbell

Contact: Martin Lowe at (408) 879-9469

e-mail:martin@martinlowecpa.com

RSVP requested

Thursday, September 4

12:00 PM – 1:00 PM

Tax Support Group (Everything but 1040s)

Telesky Financial Services

2095 Park Ave, San Jose

Contact: Jan Telesky at (408)-551-6580

e-mail:jdtele@aol.com

RSVP requested

Thursday, September 11

11:30 AM – 12:30 PM

Tax Support Group

Bakers Square

5055 Almaden Expressway, San Jose

Contact: Beverly Houghton at (408) 356-4832

RSVP requested to khaughton@juno.com

October SIGS

Tuesday, October 7

11:30 AM – 12:30 PM

General Tax & Practice Mgmt SIG

Holder's Country Inn

998 S. De Anza Blvd, San Jose

Contact: Sonya Meissner EA at (408) 257-9134

e-mail:sonya_meissner@yahoo.com

RSVP requested

Wednesday, October 1

11:45 AM – 12:45 PM

Tax Support Group

Effie's

331 W Hacienda Ave, Campbell

Contact: Martin Lowe at (408) 879-9469

e-mail:martin@martinlowecpa.com

RSVP requested

Thursday, October 2

12:00 PM – 1:00 PM

Tax Support Group (Everything but 1040s)

Telesky Financial Services

2095 Park Ave, San Jose

Contact: Jan Telesky at (408)-551-6580

e-mail:jdtele@aol.com

RSVP requested

Thursday, October 9

11:30 AM – 12:30 PM
Tax Support Group
Bakers Square
5055 Almaden Expressway, San Jose
Contact: Beverly Houghton at (408) 356-4832
RSVP requested to khaughton@juno.com

November SIGS

Tuesday, November 4

11:30 AM – 12:30 PM
General Tax & Practice Mgmt SIG
Holder's Country Inn
998 S. De Anza Blvd, San Jose
Contact: Sonya Meissner EA at (408) 257-9134
e-mail:sonya_meissner@yahoo.com
RSVP requested

Wednesday, November 5

11:45 AM – 12:45 PM
Tax Support Group
Effie's
331 W Hacienda Ave, Campbell
Contact: Martin Lowe at (408) 879-9469
e-mail:martin@martinlowecpa.com
RSVP requested

Thursday, November 6

12:00 PM – 1:00 PM
Tax Support Group (Everything but 1040s)
Telesky Financial Services
2095 Park Ave, San Jose
Contact: Jan Telesky at (408)-551-6580
e-mail:jdtele@aol.com
RSVP requested

Thursday, November 13

11:30 AM – 12:30 PM
Tax Support Group
Bakers Square
5055 Almaden Expressway, San Jose
Contact: Beverly Houghton at (408) 356-4832
RSVP requested to khaughton@juno.com

**MSEA Website – A Member
Resource**

<http://www.missionneas.org/links.html>

Educational Opportunities

See our MSEA web site for registration information. <http://www.missionneas.org/>

Workshop Mini Seminars
are in full swing at a price of \$40 each.
Saturday mornings for 4 hours each:

- **9/6/2008** Mortgage Interest
- **9/13/2008** Collections, Offers In Compromise & Bankruptcy
- **9/20/2008** QuickBooks @ Year End

The final Mini on **9/27/2008** is 2 hours for: Ethics

14th Annual Town Hall Meeting
Tax Practioner/IRS

IRS subject matter experts present:

- Audits, CP200s & 90 day notices
- Collections & Taxpayer Advocate
- AMT related issues
- Mortgage Interest Issues
- Foreclosures

Meetings are scheduled for **9/23/2008** in Sacramento, **9/24/2008** in Milbrae, and **9/25/08** in Fresno. Cost \$150 for registration after 9/8/2008.

www.missionneas.org/pdfs/2008TownHall.pdf

**MISSION SOCIETY OF ENROLLED
AGENTS (MSEA) INVITES YOU TO
PARTICIPATE IN OUR**

New Basic Income Tax Course

What you will learn:

- How to prepare 1040 and 540 tax returns with supporting schedules. The class will provide detailed line by line instruction.
- How to interact with your tax clients and obtain information needed for the return.

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- What resources are available and where to find information that you need to prepare the tax return.
- How experienced tax professionals address various issues that arise when preparing tax returns and representing clients in audits.

When:

- **9/16/2008 to 11/20/2008**
- Every Tuesday and Thursday evening from 6:00 to 9:00

Where: Two Locations

- 2095 Park Avenue, San Jose, CA 95126
- 203-B Calle Del Oaks, Del Rey Oaks, CA 93940 (Monterey)

How Much:

- \$200.00 per student
- Income Tax Fundamentals 26th edition Whitten/Altus-Buller
- (Approximate prices: Amazon.com \$150-\$115 text or ichapter.com \$128 text/\$10 per chapter)

MSEA Presents

Brass Tax: "Stocking your Tax Tool Box 2008"

Monday, 9/22/2008

Mission Society of Enrolled Agents is proud to affiliate with Brass Tax Presentations "Stocking your tax tool box -2008." This will be offered on Monday September 22, 2008 at the Techmart Network Meeting Center in Santa Clara. Topics that will be covered:

- Foreclosures & Debt Relief – How to Handle the Multitude of Real Estate Loan Disasters Headed Your Way
- Schedule D In Pictures Revisited
- Understanding Dependents and Dependency
- Economic Stimulus Payments - Explaining These to Your Clients

- Sneak Peak - Other Areas of the Economic Stimulus Act of 2008
<http://www.missioncas.org/calendar.html>

The Mission Society in Conjunction with ClientWhys Presents the 1040 Review & Update Seminar

11/17 & 11/18, 2008 at the Wyndham Hotel

This two-day (16 hours CPE) presentation will include the following:

- New Law Changes
- Significant New Rulings
- Solutions to Troublesome Issues
- Tax Strategies
- California Differences

Registration Information: Register between **9/1/2008 and 10/18/2008** - \$318.00. After 10/18/2008 - \$338.00

Why is Our Seminar the Best Value in CPE?

Your Chapter Also Benefits - In a revenue sharing agreement with your chapter, a portion of your seminar registration fee goes to your chapter to fund your chapter's other activities.

Award-Winning Text – Our attendees tell us that our text is the best they have ever seen. Probably because our text has evolved over almost 30 years, and it has been updated to the point that many use it as their primary reference source throughout the year. Last year's text included over 900 pages of valuable information.

Bonus CPE Credits – Knowing that many of our students need more than just 16 hours of CPE, we include an 8-hr correspondence course that relates to the portion of the text not covered during the live presentation. This extra course is free to our students when they take the final exam online.

Text on a CD – We provide a CD containing the entire seminar text in a searchable PDF format with each chapter linked to the table

of contents. This provides our students with a free and excellent stand-alone tax research system.

National Phone Forum

***** Earn Free CPE *****

***The Field Audit Process:
Working Together Toward a Mutual
Commitment Date***

Date: 9/17/ 2008

- How the IRS selects returns for field examinations
- The different phases of a field examination
- Mutual Commitment Date definition
- How an MCD facilitates an examination
- Roles and responsibilities during the examination
- **Select the time that works best for you. *Note: Time zones shown are Daylight Saving Time.***

ACCESS CODE	PACIFIC
130409	7 a.m.
450562	10 a.m.
452905	1 p.m.

- Register at www.atevent.com. Reservations are limited, so register at the earliest date possible.
- You will receive a Personal Identification Number that you must use to join the conference.
- If you have never registered with AT&, you will first need to click on *create a profile*.
- Register by September 13, 2008.
- If you require special accommodations (for example, Braille, large print or interpreter services) please contact Shane Ferguson at nationalphoneforum@irs.gov

We will e-mail presentation materials the day before the forum. **If you do not receive this e-mail by noon the day before the event please, e-mail us at**

nationalphoneforum@irs.gov to request the materials

Toll free: 1-866-216-6835

- Dial in 3 to 5 minutes early
- Enter your access code, then the # sign
- Enter your PIN, then the # sign

CSEA presents the popular

**Tax Practice Management Workshop
(TPMW)**

which has been expanded to a full three-day event, with 8 hours of NAEA/CSEA CPE each day for a total of 24 hours CPE, **10/2-10/4/2008**.

Cost for Members: Day One only - \$295, after 9/15/2008 \$345. Day Two and Three only \$595, after 9/15/2008 \$645. All three days - \$795, after 9/15/2008 \$845

Location: Hilton Orange County/Costa Mesa, 3050 Bristol Street, Costa Mesa, CA 92626

Topics:

Day 1: Writing a Business Plan, Hiring & Training Employees plus 2 hours of Ethics.

Day 2: Office Procedures, Time Management, Technology, and Practice Critique

<http://www.csea.org/EducationandEvents/TaxPracticeManagement/tabid/97/Default.aspx>

Member Benefits

What's In It for Me?

Most members say they joined MSEA for the networking and educational opportunities.

Having access to local classes on current tax issues and association members who can assist in resolving client tax issues is a benefit we all experience frequently. Additionally, there are more benefits at the state and national levels. You may not utilize these benefits as frequently but they can have an enormous impact on our profession and rights to practice.

National Association Benefits:

- Advocates for Enrolled Agents and tax payers before governmental bodies
- Notifies members of tax law change and its impact on you and your clients
- Generates national public relations and marketing materials for members
- Provides tax research services
- Offers national discounts on insurance, web hosting, tax reference materials, DHL Express and other business services
- Provides sample press releases for promoting you as an Enrolled Agent
- Publishes bi-monthly magazine
- Networking opportunities with enrolled agents nationwide, legislators & IRS

California State Benefits:

- Provides free state-wide marketing through website "Find an EA" section
- Offers discounts for Super Seminar and other educational courses
- Lobbies California state legislators and tax agencies on your behalf
- Liaison with local IRS offices
- Offers discounts on CCH products and BA Merchant credit card services
- Publishes monthly journal and annual client tax newsletter
- Provides members with a practice management guide for new businesses
- Offers education scholarships through the foundation
- Developed a practice management guide CD for new practices
- Networking opportunities with enrolled agents statewide, legislators & FTB

MSEA Benefits:

- Offers quality and affordable local classes for continuing education credit
- Hosts networking opportunities (i.e., monthly luncheon, SIGS, Speakers Bureau)
- Publishes job opportunities

- Offers 60-Hour basic tax course for anyone pursuing CTEC registration
 - Provides discounts on Quickfinder and educational seminars
 - Offers an opportunity to meet local IRS managers and directors
 - Encourages member information exchange and tax issue resolution through the Special Interest Groups (SIGs)
-

Support our Classified Advertisers

EMPLOYMENT

<http://www.missioneas.org/classifieds.html#employment>

PRODUCTS

<http://www.missioneas.org/classifieds.html#products>

PRACTICE WANTED

<http://www.missioneas.org/classifieds.html#practice>

CSEA Education Foundation Scholarship Program

Established in 1984 by outgoing President Nancy Nesbitt, EA, CSEA's Scholarship Fund awarded tens of thousands of dollars to worthy students to assist them with their education, particularly to promote the Enrolled Agent profession as a career choice.

In January 2008, the CSEA Education Foundation was formed as a 501(c)(3) entity, and has established a new Scholarship Program. The Foundation is separate from CSEA, and the Scholarship Committee is now a committee of the Foundation, not of CSEA.

The primary purpose of the Foundation is to foster, improve and provide access to tax-related information and services available to the general public through education programs and scholarships aimed at increasing

the knowledge of current Enrolled Agents and potential EA candidates.

There are two types of scholarships available.

(1) California residents not currently or previously licensed as EAs are eligible to apply for a scholarship for tuition, including registration fees and books, for courses in the field of taxation, finance, or accounting, particularly courses specifically designed for Special Enrollment Examination (SEE) preparation.

Download application form [S-1](#) (for non-EAs).

(2) Current California EAs who wish to broaden their knowledge in the field of taxation are eligible to apply for a scholarship for appropriate courses. Scholarships are NOT awarded for courses necessary to maintain Continuing Professional Education hour requirements, but are specifically intended for courses that expand the fields of knowledge and expertise. Examples of appropriate courses include Tax Court, NTPI, C-STAR, etc.

Download application form [S-2](#) (for EAs).

Scholarship Awards are funded through the generosity of the Members of the California Society of Enrolled Agents and by sponsors, donors, and bidders of the Society's annual Scholarship Auction.

Contributions to the CSEA Education Foundation are deductible for tax purposes.

See the applications for additional information. Completed applications with all required documentation should be sent to CSEA Education Foundation, 3200 Ramos Circle, Sacramento, CA 95827-2513.

MSEA Is Soliciting Bids to Host Our Staff Office

The Board of Directors of MSEA has voted to request bids for hosting our staff office, Bookkeeper, and Tax Preparation of our Non-Profit tax return. These are three separate bids. Your bid should contain the amount for each item separately, but you are encouraged to give a bid on a combination of two or more of the functions giving the society a discount for doing so. In addition to your bid, please list your qualifications, and a brief statement as to what makes your office uniquely qualified for the job(s) you are bidding on.

1. Please place your bid in a sealed envelope.
2. Your bid must be received by **October 10, 2008**.
3. The winner(s) of the bids will be asked to start **November 1, 2008**
4. If you have any question you may contact Alan Pinck, EA at (408) 298-7199 or alan@apinckandassociates.com
5. Mail your bid to: A Pinck Associates, 284-A Barnard Av, San Jose CA 95125
6. Put on the outside of your envelope **“MSEA BID”** boldly so your envelope is not opened until the August board meeting.

You will find the details for each job below. Thank you for your interest.

Regards,

Randy Warshawsky, EA

President MSEA 2007-2009

Staff Office:

The requirement and duties for this job are:

1. Must have at least one employee. (d)
2. Make deposits for MSEA and communicate with the Treasurer and Bookkeeper regarding the sources and amounts of all deposits. (w)
3. Open Mission mail and route it to the appropriate person. (d)
4. We are using Signup 123 for registration of most MSEA events. You will be in charge of maintaining this and registering anyone that contacts the office directly. (m)
5. Run any misc. credit card charges not handled by Signup 123. (m)
6. Keep updated records of members' contact information. (m)
7. Answer the MSEA phones Monday thru Friday 9 to 5. We may consider Monday thru Thursday. Please indicate in your bid which applies. (d)
8. Keep updated member contact information on constant contact and Signup 123 (m)
9. Prepare attendance list for SJ meetings and all education events. (m)
10. Prepare evaluation of speaker for SJ meetings and all education events. (m)
11. Prepare CPE certificates for SJ meetings and all education events. (m)
12. Supply an office liaison to attend all board meeting (no meeting in Feb and Mar) (m)

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13. Order supplies and stamps as needed. (v)
14. Prepare paperwork for various classes/seminars. (m)
15. Send out new member package. (m)
16. Prepare plaques for new members (m)
17. Order past presidents' plaque (y)
18. Print and file with CSEA continuing education forms. (m)

(d) = Daily (w) = Weekly (m) = Monthly (y) = Yearly (v) = Various