



# Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

August 2005 / Volume 1 / Issue 1

## Board of Directors

**President**  
Karen L. Fihn, EA

**1st Vice President**  
George Pan, EA

**2nd Vice President**  
Randy Warshawsky, EA

**Treasurer**  
Rick Hillsbery, EA

**Secretary**  
Ted Danen, EA

**Immediate Past President**  
Andrew Bonfield, EA

**CSEA Directors**  
**1 Year Term**  
Mandy Bamdad, EA  
Myra Thompson, EA

**Directors - Second Year of Two Year Term**  
Tom Chun, EA  
Ilsa Beck, EA  
James "Bud" Houston, EA  
Jessie Singh, EA

**Directors - First Year of Two Year Term**  
Margy Dunn, EA  
Dorothy McGinley, EA  
Rosemary Hernandez, EA

**For Contact information for any of the Board Members listed above you will find them on the web site under the MSEA board area.**

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## President's Communication

Have you checked out the new MSEA website? IT IS GREAT. And keep watching. There are more changes to come in the next few months. How do you like the format for this newsletter? Our thanks go to Randy Warshawsky for a job well done. Please let Randy know how much you appreciate his work. He is also open to any suggestion if there is anything else you would like to see changed or added to the newsletter or website.

Congratulations to Joe Salazar, who was presented a commendation from the State Senate for his service to the CTEC council. We were able to present to Joe the beautifully framed senate resolution at our last meeting.

If you missed our last meeting in San Jose I'm sorry. We had Alan Jensen and Keith Kershner from the IRS as our Speakers. Many of you may know that Alan will be retiring from the IRS in a few months. If you still want to see him before he leaves, come to the Practitioners Panel meeting on August 24th. Please be sure to RSVP prior to the meeting so that we will have enough food for everyone. There is no cost to attend the meeting or for lunch.

We also had the pleasure of presenting CSEA scholarship awards at our last meeting and greeting 5 new MSEA members.

I have had a busy month attending CSEA and chapter committee and board meetings. As you read this I'm in Washington DC attending the NAEA annual meeting. I've also attended a joint meeting with other chapters in our area. We are working on increasing the communication not only within our chapter but between chapters in our area. We have joined with our neighbor chapters with advertising during tax season, advertising our SEE classes and presenting the annual Town Hall Meeting ( which by the way is in Emeryville this year on Sept. 30th) We are planning even more joint ventures in the months to come. We are friends not rivals. We have a lot to offer all of our members. And with increase communication between all of us we will all grow and prosper.

Looking forward to seeing you at our August meeting.

*Karen Fihn, EA, President MSEA*

Phone: (408) 551-6580  
Email: karenfihn@aol.com

### Mission Society of Enrolled Agents, Inc.

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Campbell, CA 95008  
www.missioneas.org

Phone: (800) 832-6732  
Fax: (408) 371-8677  
office@missioneas.org

## Committee Chairs:

### Audit

Jessie Singh, EA

### Awards

Viola Nosinger, EA

### Budget & Finance

Rick Hillsbery, EA

### By Laws

Rosemary Hernandez, EA

### Communications

#### /Newsletter

Randy Warshawsky, EA

### CTEC Representative

Gregory Steinbis, EA

### Disaster Service

Irene Lawrence, EA

Margy Dunn, EA

### Education

George Pan, EA,

### Ethics and

#### Professional Conduct

Norma Foss, EA

### Legislative Affairs

Mandana Bamdad, EA

### Long Range Planning

George Pan, EA

Randy Warshawsky, EA

### Membership

Richard "Rick" Hillsbery, EA

### Monthly Meeting Program

George Vogel, EA

### Nominating

David Hatt, EA

### Office Liaison

Ted Danen, EA

### Past Presidents

#### Advisory Council

David Hatt, EA

### Public Awareness

#### & Information

Tom Chun, EA

### Scholarships

Dorothy McGinley, EA

### Tax Support &

#### Special Interest Groups

James "Bud" Houston, EA

For contact information for any of the chairs listed above you will find them on the web site under the MSEA board area.

## Board of Directors Minutes

San Jose, CA

June 21, 2005

The Mission Society of Enrolled Agents regular Board Meeting was called to order by President Karen Fihn, EA at 10:00 AM.

Roll call was taken. Board members present: President Karen Fihn, EA, First Vice President George Pan, EA, Second Vice President Randy Warshawsky, EA, Secretary Ted Danen, EA, Immediate Past President Andrew Bonfield, EA, CSEA Director Myra J. Thompson, EA, Directors Ilse Beck, EA, Rosemary Hernandez, EA, Tom Chun, EA and Margy Dunn, EA. Board members Absent: CSEA Director Mandy Bamdad, EA, Director Dorothy McGinley, EA, and Treasurer Rick Hillsbery, EA. Visitors: Jessie Singh, EA, James Houston, EA and George Vogel, EA.

Minutes of the meeting were approved as presented.

**TREASURER'S REPORT:** Was presented.

**COMMITTEE AND ORGANIZATION REPORTS:** Were presented.

**OLD BUSINESS:** A motion was made and passed for MSEA to offer CCH on-line classes in the amount of \$229 for members and \$249 for non-members.

**NEW BUSINESS:** A motion was made and passed that Jessie Singh, EA and James Houston, EA be accepted by the Board as new Directors appointed by President Karen Fihn, EA.

**ADJOURNMENT:** There being no further business, the board meeting was adjourned at 11:30 AM by President Karen Fihn, EA. The next meeting is scheduled for August 16, 2005 at 10:00 AM at Maggiano's, in San Jose.

Respectfully Submitted,

*Ted Danen, EA*

*Secretary*

I am interested in sharing office space in Cupertino or San Jose. Please contact Nancy by email: nap@lifo.biz or call 650-823-5383.

## New and Improved

I want to thank everyone that was involved in getting the first web site of MSEA up and running, it was a large step for MSEA and now we are taking our second step into our internet presence.

I hope you are finding the "NEW" web site and now Volume 1 Issue 1 of the "NEW" newsletter not only pleasing to the eye but more helpful in finding information.

If you have any suggestions I am always willing to listen. We do have more ideas and changes that are going to take place over the next few months. Help us make this web site and newsletter useful to you.

We have had some requests for a member listing on the web site and per CSEA rules unable to do so. You are able to access the CSEA site directly from our site to find an EA. You will find this under the contact us area.

Do you want to write an article? Do you want to make an announcement? Do you want to be on the Communication Committee? Do you have links we should add to our website?

Send any suggestions, articles or announcements to:

editor@missioneas.org.

Thanks,

Randy Warshawsky EA, Editor



### Tax Help Needed

Looking for two tax professionals to work YEAR round in a busy tax office. Experience preferred.

Pluses:

- Lacerte
- QuickBooks
- Tax Tools
- Excel
- Outlook
- Good Telephone Skills
- EA or CPA

**The Tax Man**

1800 Hamilton Av #220 Located between Meridian and Leigh Av.

E-mail resumes with salary requirement to HRAdmin@4taxman.com

# WHAT'S UP

## Educational Events

### Preparatory Course for IRS Special Enrollment Examination

Big Valley Chapter, East Bay Association, Golden Gate Chapter, North Bay Chapter, and Mission Society of Enrolled Agents Present the 31st Annual 2005 Preparatory Course for IRS Special Enrollment Examination.

IRS Examination Dates - September 21 & 22, 2005

### 2005 Mini Workshops

The Education Committee proudly offers our members Continuing Education courses at very low, affordable prices this summer through our 2005 Mini Workshops. All classes are held at the Santa Clara Elks Lodge, 1680 Martin Ave, Santa Clara, CA 95052.

When: Every Saturday from Sept.10 - Oct. 22

Where: Santa Clara Elks Lodge

### Town Hall Meeting - Working with the IRS Facilitating the Win/Win Situation

Introducing a New and Improved Format for Attorneys, CPAs, EAs and CTEC tax professionals. This event will provide you with a valuable opportunity to earn up to 8 CPE credits while participating in presentations that include extensive Q&A and open panel discussions with IRS Subject Matter Experts on the following topics:

- Audits
- Client Options
- Penalty and Interest Abatement
- Ethical Considerations and Client Representation
- Special Luncheon Key Note Speaker

**When:** Friday, Sept. 30, 2005

8:00 a.m. – 5:00 p.m.

Registration begins at 7:00 a.m.

**Where:** Holiday Inn – Bay Bridge  
1800 Powell Street, Emeryville, CA

### Choice of Entities with George Butts, CPA

Routinely, clients ask your opinion on the pluses and minuses of forming a C -Corporation, S-Corporation, and LLC. Find out what your clients need to know to make a choice between these three business entities.

**When:** Thursday, October 27  
8:30 am – 5:00 pm (8 hrs. CPE)

**Where:** Radisson Inn, Sunnyvale,  
1085 East El Camino Real

## In The News

### New Reservation Policy

The Mission office has been requesting that members please RSVP by Thursday prior to our general meetings. However, members are showing up at the door without calling in a prior reservation. We have run out of seating space because the room size is dependent on the number of reservations. Beginning at the August meeting, if you call after Thursday evening at 5:00 pm or show up at the door, we will be charging you an additional \$5.00 for lunch.

### Scholarship Awards

Congratulations to the following MSEA sponsored CSEA Scholarship awardees.

- Russell Barnett
- Patricia T. Cohen
- Donna Dewhirst
- Margaret Finney
- Regina Ly
- Sheri Parelskin
- Nancy Pelich
- Inger Robinson
- Volha Shpileuskaya
- Jayant Trivedi

### New Members

We would like to welcome the following new members to Mission Society:

- Julie Brown, EA
- Marisue Hansen, EA
- Eva Hartzell, EA
- Volha Shpileuskaya, EA
- Patrick Young, EA

For more information on events and much more, check out our new website at [www.missioneas.org](http://www.missioneas.org)

# August

<p><b>Monday, August 01</b> 10:00 AM - 12:00 PM Education Meeting</p> <p><b>Tuesday, August 02</b> 8:00 AM - 9:30 AM Membership Meeting</p> <p><b>Wednesday, August 03</b> 11:30 AM - 12:30 PM Effie's, 331 W Hacienda Ave, Campbell</p> <p><b>Thursday, August 04</b> 7:45 AM - 9:00 AM Holder's Country Inn</p> <p>11:30 AM - 12:30 PM Estate and Trust, City Dinner</p> <p><b>Saturday, August 06</b> 9:00 AM - 3:00 PM SEE classes (EA Exam) to be held at 2095 Park Ave. San Jose</p>	<p><b>Wednesday, August 10</b> 11:30 AM - 12:30 PM City Dinner</p> <p><b>Saturday, August 13</b> 9:00 AM - 3:00 PM SEE classes (EA Exam) to be held at 2095 Park Ave. San Jose</p> <p><b>Tuesday, August 16</b> 10:00 AM - 11:30 AM Board Meeting MSEA</p> <p>11:30 AM - 11:45 AM Social Time</p> <p>11:45 AM - 1:30 PM San Jose Meeting Maggiano's Little Italy in San Jose</p> <p><b>Thursday, August 18</b> 12:00 PM - 2:00 PM Palo Alto Satellite Meeting Ming's Restaurant in Palo Alto</p>	<p><b>Saturday, August 20</b> 9:00 AM - 3:00 PM SEE classes (EA Exam) to be held at 2095 Park Ave. San Jose CA 95126</p> <p><b>Wednesday, August 24</b> Practitioner Panel Meeting 2095 Park Ave. San Jose. Please RSVP by 8/22/05 as lunch is provided. MSEA office Office@missioneas.org or 800-832-MSEA (6732)</p> <p>6:30 PM - 8:30 PM Monterey Satellite Meeting Lugano's Swiss Bistro in Carmel</p> <p><b>Saturday, August 27</b> 9:00 AM - 3:00 PM SEE classes (EA Exam) to be held at 2095 Park Ave. San Jose</p>
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### Satellite Meetings

San Jose Meeting	Palo Alto Meeting	Monterey Meeting
<p>3rd Tuesday of the Month 11:30 AM Maggiano's Little Italy Santana Row 3055 Olin Ave.#100 San Jose CA 95128</p>	<p>3rd Thursday of the Month 12:00 Noon Ming's Restaurant 1700 Embarcadero Rd., Palo Alto CA 94303</p>	<p>4th Wednesday of the Month at 6:30 PM Lugano's Swiss Bistro, 3670 The Barnyard Carmel, CA 93923</p>

# C A L E N D A R

## September

### Thursday, September 1

7:45 AM - 9:00 AM  
 Holders Country Inn  
 Contact Marilyn Mac Nab  
 408-446-4451 or  
 macnab@taxmam.com

11:30 AM - 12:30 PM  
 Estate and Trust, City Dinner  
 Contact: Bill Downey 408-241-8482  
 RSVP requested by email to  
 taxpro@bdowney.com

### Wednesday, September 07

11:30 AM - 12:30 PM  
 Effie's, 331 W Hacienda Ave,  
 Campbell  
 Contact:  
 Martin Lowe 408-879-9469 email at  
 martinlowecpa@sbcglobal.net  
 RSVP requested

### Friday, September 09

8:00 AM - 5:00 PM  
 State Liaison Meeting Sacramento  
 see CSEA for further details.

### Saturday, September 10

8:00 AM - 5:00 PM  
 CSEA Meeting Sacramento See  
 CSEA website for further details

8:00 AM - 5:00 PM  
 SEE classes (EA Exam) REVIEW  
 CLASS to be held at 2095 Park Ave.,  
 San Jose

9:00 AM - 12:00 PM  
 Gift Tax Return Form 709 to be held  
 in Santa Clara at the Elks Lodge  
 Instructor: Lynn Telford EA  
 Contact the MSEA to register for  
 this class. 800-832-MSEA (6732) or  
 office@missioneas.org.

### Sunday, September 11

8:00 AM - 5:00 PM  
 CSEA Meeting Sacramento See  
 CSEA website for further details

### Tuesday, September 13

8:30 AM - 10:00 AM  
 Membership Committee  
 Just Breakfast Restaurant  
 Morgan Hill.  
 RSVP: Rick Hillsbery, 408-371-8700  
 or email: rick\_hillsbery@pacbell.net

### Wednesday, September 14

11:30 AM - 12:30 PM  
 City Dinner  
 Contact: Beverly Haughton  
 408-356-4832  
 khaughton@juno.com

### Thursday, September 15

12:00 PM - 2:00 PM  
 Palo Alto Satellite Meeting  
 Ming's Restaurant, Palo Alto -  
 Speaker To Be Announced  
 RSVP to Bob at (650) 948-1559 or  
 adellera@aol.com

### Saturday, September 17

8:00 AM - 5:00 PM  
 SEE classes (EA Exam) REVIEW  
 CLASS to be held at 2095 Park Ave.,  
 San Jose

9:00 AM - 12:00 PM  
 Reporting K-1 Information - to be  
 held at Elks Lodge, Santa Clara  
 Instructor: Karshed Alam  
 Contact the MSEA to register  
 800-832-MSEA (6732)  
 or office@missioneas.org.

### Tuesday, September 20

10:00 AM - 11:30 AM  
 Board Meeting MSEA

11:30 AM - 11:45 AM  
 Social Time

11:45 AM - 1:30 PM  
 San Jose Meeting  
 Magiano's Little Italy in San Jose  
 Speaker: Irene Lawrence EA, 1st Vice  
 President CSEA. Topic: Ethics  
 RSVP by Thurs. prior to the meeting  
 - \$20. After that or at the door - \$25.  
 RSVP to 800-832-MSEA (6732) or  
 office@missioneas.org

### Wednesday, September 21

9:00 AM - 11:00 AM  
 EA Exam is being held today  
 Parts 1 & 2

### Thursday, September 22

9:00 AM - 11:00 AM  
 EA Exam is being held today Parts 3  
 & 4

### Saturday, September 24

9:00 AM - 12:00 PM  
 Quick Books - to be held in Santa  
 Clara at the Elks Lodge  
 Instructor: Mandy Bamdad  
 Contact MSEA to register.  
 800-832-MSEA (6732)  
 or office@missioneas.org

### Wednesday, September 28

6:30 PM - 8:30 PM  
 Monterey Satellite Meeting  
 Lugano's Swiss Bistro in Carmel  
 Speaker To Be Announced  
 Please RSVP to Andy Bonfield at  
 831-625-7681

### Thursday, September 29

8:00 AM - 5:00 PM  
 Business Law for Tax Professionals  
 to be held in Monterey (Tentative  
 date)  
 Contact the MSEA to register for this  
 class. 800-832-MSEA (6732) or  
 office@missioneas.org

### Friday, September 30

8:00 AM - 5:00 PM  
 Town Hall Meeting to be held at 1800  
 Powell St, Emeryville. See MSEA  
 website for enrollment forms.