



# Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

August 2007 / Volume 3 / Issue 6

## Board of Directors

### President

Randy Warshawsky, EA

### President Elect

Myra Thompson, EA

### 2nd Vice President

Alan Pinck, EA

### Treasurer

Russell Barnett, EA

### Secretary

Jessie Singh, EA

### Immediate Past President

George Pan, EA

### CSEA Directors

#### 1 Year Term

James Houston, EA

Myra Thompson, EA

#### Directors - Second Year

##### of Two Year Term

Dorothy Lang, EA

Ilsa Beck, EA

Margy Dunn, EA

Sam Trinh, EA

#### Directors - First Year

##### of Two Year Term

Arnold Pinck, EA

Torie Charvez, EA

Wai Ling Chai, EA

Jill Mendenhall, 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.

1475 S Bascom Ave. #206

Campbell, CA 95008

Phone: (800) 832-6732

Fax: (408) 371-8677

www.missioneas.org

office@missioneas.org

## President's Communication

If you didn't notice on last month newsletter or on our website, Karen Fihn is the EA of the year for CSEA. I was honored to be in attendance in Ventura when Karen was awarded this honor. Karen has held many positions on the MSEA board and sometimes even more than one at the same time. I want to personally thank her for all that she has done for Mission Society.

We just had the first board meeting of 2007-2008. I want to tell you what we talked about the most, you our members. We want to make sure that we are providing an avenue for you to excel in your profession as an EA. We provide networking and education opportunities with our monthly meeting in San Jose, Monterey, and Palo Alto. We provide a way to discuss with your peers problems you are having in your practice with the Special Interest Groups (find them listed under meeting on the website). The Education committee is working hard to deliver excellent continuing education events.

Check out the website for information on any of the above [www.missioneas.org](http://www.missioneas.org).

Hopefully you all had an opportunity to respond to the survey that was sent out to you on July 17, 2007. We hope to do a few more surveys over this year to help the board deliver what you want as members. Thank you for responding to them.

Contact me about anything to do with MSEA and I will either help you or get you connected with the right person that can help you.

Randy Warshawsky, EA

(408) 445-1151

Randy@4taxman.com

## CSEA, EA of the Year Award



**Karen Fihn** won the EA of the Year Award presented by CSEA at the 2007 Annual Meeting in Ventura in June.

Karen, past president of MSEA, is conscientious in her efforts to promote the professionalism of enrolled agents and is dedicated in her work for MSEA, CSEA, and NAEA.

This award is well deserved.

Congratulations, Karen!

## Monthly Meetings

### San Jose Meeting

3rd Tuesday of the Month at 11:30 AM  
Maggiano's Little Italy, Santana Row  
3055 Olin Ave. #100, San Jose

**Speaker:** David C. Smith, President, Business Brokerage, Inc.

**Topic:** *Sale/Purchase of Tax & Accounting Practices*

### Monterey Meeting

4th Wednesday of the Month at 6:30 PM  
Lugano's Swiss Bistro  
3670 The Barnyard, Carmel

**Speaker:** TBA

**Topic:** TBA

### Palo Alto Meeting

4th Tuesday of the Month at 6:30 PM  
Ming's Restaurant  
1700 Embarcadero Road, Palo Alto

**Speaker:** Philip Fiegler, EA

**Topic:** *Understanding Puts and Calls*

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## Committee Chairs:

### Awards

Viola Nosinger, EA

### Budget & Finance

Russell Barnett, EA

### By Laws

Rosemary Hernandez, EA

### Communications

#### /Newsletter

Dorothy McGinley, EA

### CTEC Representative

John Oliver, EA

### Disaster Services

Karen Fihn, EA

### Education

George Vogel, EA

### Ethics and

#### Professional Conduct

Norma Foss, EA

### Legislative Affairs

David Hatt, EA

### Long Range Planning

Myra Thompson, EA

### Membership

Jill Mendenhall, EA

### Monthly Meeting Program

George Vogel, EA

### Nominating

Karen Fihn, EA

### Office Liaison

Dorothy Lang, EA

### Past Presidents

#### Advisory Council

Karen Fihn, EA

### Public Awareness & Information

Laura Hadduck, EA

Susan Knowles, EA

### Review (Formerly Audit)

John Oliver, EA

### Scholarships

Jessie Singh, EA

### Tax Support &

#### Special Interest Groups

James Houston, EA

For contact information for any of the chairs listed above is available on the web site under the MSEA board area.

## Board of Directors Minutes

San Jose, CA

July 17, 2007

The Mission Society of Enrolled Agents regular board meeting was called to order by President Randy Warshawsky, EA at 10:05AM.

Roll call was taken. Following board members present: President Randy Warshawsky, EA, President Elect President & CSEA Director Myra Thompson, EA, Vice President Alan Pinck, EA, Secretary Jaswant S. Jessie, EA, Immediate Past President George Pan, EA, Treasurer Russell Barnett, EA. CSEA Director James Houston, EA, Directors Dorothy Lang, EA, Ilse Beck, EA, Margy Dunn, EA, Torie Charvez, EA and Jill Mendenhall, EA

Visitor: Viola Nosinger, EA and George Vogel, EA

Board member absent: directors Sam Trinh, EA, Wai Ling Chai, EA and Arnold Pinck, EA.

Minutes of the last meeting were accepted as presented.

TREASURER'S REPORT: Was reviewed.

COMMITTEE AND ORGANIZATION REPORTS: Were presented.

OLD BUSINESS: No motions were made.

NEW BUSINESS: A motion was made and passed and approved to invite 2 scholarship recipients for monthly lunch meeting and MSEA will pay for it.

ADJOURNMENT:

There being no further business, the board meeting was adjourned at 11:35AM by President Randy Warshawsky, EA.

The next meeting is scheduled for August 21, 2007 at 10:00AM at Maggiano's, in San Jose, CA.

Respectfully Submitted,  
Jaswant S. Jessie, EA  
Secretary

## IRS Town Hall Meeting

### Save the Date - Town Hall Meeting

Thursday, September 27, 2007

8:30 AM - 4:30 PM

Radisson Hotel

1471 N 4th St., San Jose 95112

## Take Me Out To The Ball Game!

Come one come all to the M.S.E.A. second annual baseball and BBQ. Mark your calendar for Wednesday August 22, 2007 and plan to meet us at the San Jose Giants Stadium for a fun filled night of great baseball and BBQ, and as if that were not enough, there will be a fireworks show after the game.

For only \$20.00 per ticket you will get a general admission seating ticket and a full dinner including soft drink from Turkey Mike's BBQ located inside the park, and of course fireworks. The BBQ is a choice of mesquite grilled chicken dinner, BBQ ribs, tritip sandwich or Philly sandwich. Each of these come with 2 sides of your choice. You may also choose any 2 of his sandwiches burgers, sausages, hot dogs, ect. and 1 side.

**Date:** 08/22/07

**Time:** 5:30 pm

**Phone:** 1-800-832-6732

**E-mail:** office@missioneas.org

**RSVP** by 4:00 pm August 2

**Location:** 588 E. Alma San Jose 95112

Bring the whole office, your kids, your wife, your significant other!

Seeking Enrolled Agent for full time position in Morgan Hill, California. Minimum three years of individual and estate tax experience preferred.

Software skills should include Lacerte, QuickBooks, Excel and Word. We are a small CPA office (7 employees) looking for someone who enjoys tax work and wants to be part of a customer service-oriented team.

Good people skills and ability to work efficiently with minimal supervision are a must. Email resume to: dolores@steinbiscpa.com.

## Request for Volunteers

A special joint task force subcommittee has been created by the Public Information and Awareness Committee and the Membership and Chapter Development Committee. Technology and its use is an integral part of all of our practices and the CSEA Board of Directors has the foresight to address it.

The membership of the committee is set. What we need are supporting members to help with some of the work. Frequently, our members tell us that they don't have the time to be involved with our society. This is a great way for our members to "help us to help you" without devoting more time than they can afford to give nor leave their home area.

The first task the subcommittee would like to address is the CSEA website. We need members who can review and comment on various pages of the website. Please ask the members of your chapter to volunteer for this important project that will pay dividends for all of us.

Thank you.

Norman M. Golden, EA  
Chair, CSEA Technology Subcommittee  
1065 East Hillsdale Boulevard, Suite 109  
Foster City, CA 94404-1688  
650-212-1040  
650-212-1044 Fax  
www.goldentax.com



### Year Round

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

**\*\*Available Now\*\***

E-mail resumes with salary requirement to [HRAdmin@4taxman.com](mailto:HRAdmin@4taxman.com)

**The Tax Man**  
1800 Hamilton Av #220 Located between Meridian and Leigh Av.

Pluses:

- Lacerte
- QuickBooks
- Tax Tools
- Excel
- Outlook
- Good Telephone Skills
- EA or CPA a plus (not req)

## CSEA Report

Are you taking advantage of all CSEA has to offer? There are many great sections on the CSEA's website that pertain to you and are valuable if you participate.

Don't forget to fill in or update your member information in the website. Go to [www.csea.org](http://www.csea.org) then Members Tools, Preferences, and My Information which includes My Advertising and My Subscription sections.

The Member-to-Member Referral Program was created to help other members find a member who specializes in the area in which they need help. This program is a special service of CSEA to help promote member interaction and provide a link between the knowledge and the need for it. If you haven't already, please sign up for this program and select your fields of expertise so that other members may benefit from your knowledge and experience. You may enroll in the program in the Preferences area, in the My Subscriptions section.

The Preferences section is your direct path to managing your information. In this section, you are able to update your information directly into the Society database, manage your classified advertising, and manage your email subscriptions.

The CSEA website can be a great tool if utilized.

September 7 the annual CSEA State Liaison meeting takes place in Sacramento. September 7-9 is the next CSEA board and committee meetings in Sacramento. Everyone is welcome to attend.

## Write An Article For MSEA

Do you have something that would benefit other members of MSEA? Consider writing an article for the MSEA newsletter. Some ideas that I would like to see would be: security issues, paperless office, practice management, engagement letters, and the list goes on and on. If you are passionate about something consider writing an article.

## Do you Know the History of MSEA?

On the 30th birthday of MSEA a group of members combined their knowledge to present the history of MSEA at our anniversary party. We are trying to find a copy to post up on our website. If you have a copy could you please send it to Randy. If you know someone who may have it, send Randy who so he can follow up with them

You can contact Randy at:  
 randy@4taxman.com  
 408-445-1151 – phone  
 408-445-1152 – fax

## CSEA Audio Tax Entity Series

Dear CSEA/NAEA Members, Affiliates, Associates, and Prospective Members:

A CSEA Audio Tax opportunity you cannot afford to miss. The Audio Tax Entity Series presented by Vicki Mulak, EA, CFP!

- \*August 1, 2007 - Choice of Entity
- \*September 5, 2007 - Partnerships
- \*October 3, 2007 - S-Corporations

CSEA Members, Affiliates and Associates - All 3 sessions for \$125! This is a \$25 savings off of the regular Audio Tax registration fee. (\$50 per session if you register for 1 or 2 of the sessions)

Non-Members - All 3 sessions for \$200. (\$75 per session if you register for 1 or 2 of the sessions)

For more information or to register, go to [www.csea.org/audiotax/](http://www.csea.org/audiotax/) or call CSEA at 800/777-2732.

If you have any questions, please contact CSEA at 800/777-2732. We look forward to your participation in these events!

If you have already registered, thank you! You will receive a registration acknowledgement via email. For information on other upcoming Audio Tax sessions go to: <http://www.csea.org/audiotax/>.

## Visiting the Fresno Campus

Would you be interested in visiting the Fresno campus?

If you would, send an e-mail to James Kinsey. In the subject line put "I want to visit Fresno" The address is: [James.R.Kinsey@irs.gov](mailto:James.R.Kinsey@irs.gov)

If they see enough interest and understand why, maybe we can get a tour of the service center. In the text of the e-mail tell James what you would be interested in seeing and why.

## Mini Workshop Seminars

**Location:** Santa Clara Elks Lodge  
 1680 Martin Ave.  
 Santa Clara, CA 95050

**Time:** 9:00 AM – 12 Noon  
 Registration begins at 8:30AM

**Cost:** \$35 each (\$180 for all 6)  
 before 9/01/07  
 \$40 each (\$210 for all 6)  
 after 8/31/07

### Saturday, September 8

Topic: *Practice Development*  
 Speaker: To be announced

### Saturday, September 15

Topic: *Flow Through Entities*  
 Speaker: To be announced

### Saturday, September 22

Topic: *Depreciation Brush Up*  
 Speaker: Dorothy Lang

### Saturday, September 29

Topic: *Funding Trusts*  
 Speaker: Raymond Sheffield

### Saturday, October 6

Topic: *Mortgage Interest*  
 Speaker: Alan Pinck

### Saturday, October 20

Topic: *Sales Tax*  
 Speaker: To be announced

## All Day Seminar

Tuesday, October 30  
 8:30 AM – 5:00 PM

Registration begins at 8:00 AM  
 3 terrific speakers, 4 important topics  
 Roxanne Nelsen – California Nonresident Return  
 Irene Lawrence – Ethics  
 George Butts – Sale of Business Property  
 Cost Segregation

Fee: \$165 before 10/1/07  
 \$185 after 9/30/07

Santa Clara Elks Lodge  
 1680 Martin Ave.  
 Santa Clara, CA 95050

# C A L L E N D A R

## August

### Wednesday, August 1

11:30 AM - 12:30 PM

Tax Support Group  
Effie's, 331 W Hacienda Ave, Campbell  
**Contact:** Martin Lowe at 408-879-9469  
email at: martinlowecpa@sbcglobal.net  
RSVP requested

### Thursday, August 2

11:30 AM - 12:30 PM

Special Interest Group  
Estate and Trust, City Diner  
1160 Blossom Hill Road, San Jose  
**Contact:** Randi Clarke EA 408-973-9300  
RSVP requested by email to:  
randi\_tax@yahoo.com

### Wednesday, August 08

11:30 AM - 12:30 PM

Tax Support Group  
City Diner  
1160 Blossom Hill Road, San Jose

For information contact  
Beverly Haughton at (408) 356-4832.

RSVP by e-mail requested to  
khaughton@juno.com

### Tuesday, August 21

10:00 AM - 11:45 AM

San Jose Board Meeting

11:45 AM - 1:30 PM

San Jose Meeting - Maggiano's Little  
Italy in Santana Row, San Jose

**Speaker:** David C. Smith, President,  
Business Brokerage, Inc.

**Topic:** *Sale/Purchase of Tax & Accounting Practices*

RSVP must be made by Thursday prior  
to the meeting to receive the \$25 price.  
All reservations after that or at the door  
will be \$30. Please RSVP to the office  
at 800-832-MSEA (6732) or office@  
missioneas.org

1:30PM-2:30PM

Membership Committee Meeting  
Maggiano's Little Italy  
Santana Row, San Jose

We are seeking new committee mem-  
bers. Whether you have just joined or  
have been a long-time member we invite  
you to join us.

**Contact:** Jill Mendenhall 408-617-0391  
or mendenhalltaxes@gmail.com

### Wednesday, August 22

6:30 PM - 8:30 PM

Monterey Satellite Meeting  
Lugano's Swiss Bistro in Carmel

**Speaker:** To be Announced

**Topic:** To be Announced

**Cost:** \$20 for Dinner and 1 hour of CPE  
RSVP to Bay Tax Service 831-392-0584

### Tuesday, August 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:** Philip Fiegler, EA

**Topic:** *Understanding Puts and Calls*

**Dinner Fee:** \$30 in advance or \$35 at  
the door. RSVP: E-vite or contact MSEA  
office at 800-832-6732.

## September

### Wednesday, September 5

11:30 AM - 12:30 PM

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

### Thursday, September 6

11:30 AM - 12:30 PM

Special Interest Group  
Estates and Trusts  
City Diner  
1160 Blossom Hill Road, San Jose  
**Contact:** Randi Clarke EA 408-973-9300  
RSVP requested by email to  
randi\_tax@yahoo.com

### Saturday, September 8

9:00 AM to 12 Noon

Mini Workshop Seminar  
**Topic:** Practice Development  
**Speaker:** To be announced  
Registration begins at 8:30 AM  
**Fee:** \$35 before 9/1/07; \$40 after 8/31/07

Santa Clara Elks Lodge  
1680 Martin Ave.  
Santa Clara, CA 95050

### Wednesday, September 12

11:30 AM - 12:30 PM

Tax Support Group  
City Diner  
1160 Blossom Hill Road, San Jose  
For information contact  
Beverly Haughton at (408) 356-4832.  
RSVP by e-mail requested to  
khaughton@juno.com

### Saturday, September 15

9:00 AM to 12 Noon

Mini Workshop Seminar  
**Topic:** Flow Through Entities  
**Speaker:** To be announced  
Registration begins at 8:30 AM  
**Fee:** \$35 before 9/1; \$40 after 8/31

Santa Clara Elks Lodge  
1680 Martin Ave.  
Santa Clara, CA 95050

### Tuesday, September 18

10:00 AM - 11:45 AM

San Jose Board Meeting  
11:45 AM - 1:30 PM  
San Jose Meeting - Maggiano's Little  
Italy in Santana Row in San Jose  
**Speaker:** Jennifer MacMillan, EA,  
President CSEA

**Topic:** *Federal Representation Update*  
RSVP must be made by Thursday prior  
to the meeting to receive the \$25 price.  
All reservations after that or at the door  
will be \$30.

Please RSVP to the office at 800-832-  
MSEA (6732) or office@missioneas.org

10:30AM-11:45AM

New Member Orientation

Please join us for new member orienta-  
tion and learn about the benefits of your  
membership in MSEA. We want you to  
be able to utilize the benefits member-  
ship has. EAs are eager to help out fel-  
low EAs. You will hear about Education,  
Practice Management, CSEA, NAEA,  
and more.

Watch for our upcoming flyer!

Maggiano's Little Italy  
Santana Row, 3055 Olin Ave., #1000  
San Jose, CA 95128

Please RSVP on or before 09/13/07.  
Contact: Jill Mendenhall 408-617-0391  
or the MSEA office 800-832-6732

### Saturday, September 22

9:00 AM to 12 Noon

Mini Workshop Seminar  
**Topic:** Depreciation Brush Up  
**Speaker:** Dorothy Lang  
Registration begins at 8:30 AM  
**Fee:** \$35 before 9/1/07; \$40 after  
8/31/07

Santa Clara Elks Lodge  
1680 Martin Ave.  
Santa Clara, CA 95050

### Tuesday, September 25

6:00 PM - 8:00 PM

Palo Alto Dinner Meeting  
6:00 PM Registration  
6:30 PM - 8:00 PM  
Dinner and Presentation  
Ming's Restaurant  
1700 Embarcadero Road, Palo Alto  
**Speaker:** Claudia Hill  
**Topic:** *Increase of Preparer Penalties/Ef-  
fect of June 07 Tax Bill*  
**Dinner Fee:** \$30 in advance or \$35 at  
the door. RSVP:E-vite or contact MSEA  
office at 800-832-6732.

### Wednesday, September 26

6:30 PM - 8:30 PM

Monterey Satellite Meeting  
Lugano's Swiss Bistro in Carmel  
**Speaker:** To be Announced

# C A L L E N D A R

**Topic:** To be Announced  
**Cost:** \$20 for Dinner and 1 hour of CPE  
 Please RSVP to Bay Tax Service 831-392-0584

**Thursday, September 27**

**8:30 AM - 4:30 PM**  
 Registration begins at 7:30 AM  
 13th Annual Tax Practitioner/IRS Town Hall Meeting  
 Radisson Hotel  
 1471 N 4th St., San Jose

**Saturday, September 29**

**9:00 AM to 12 Noon**  
 Mini Workshop Seminar  
 Funding Trusts  
**Speaker:** Raymond Sheffield  
 Registration begins at 8:30 AM  
**Fee:** \$35 before 9/1; \$40 after 8/31  
 Santa Clara Elks Lodge  
 1680 Martin Ave.  
 Santa Clara, CA 95050

## October

**Wednesday, October 3**

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

**Thursday, October 4**

**11:30 AM - 12:30 PM**  
 Special Interest Group  
 Estates and Trusts  
 City Diner  
 1160 Blossom Hill Road, San Jose  
**Contact:** Randi Clarke EA 408-973-9300  
 RSVP requested by email to:  
 randi\_tax@yahoo.com

**Saturday, October 6**

**9:00 AM to 12 Noon**  
 Mini Workshop Seminar  
**Topic:** *Mortgage Interest*  
**Speaker:** Alan Pinck  
 Registration begins at 8:30 AM  
**Fee:** \$35 before 9/1; \$40 after 8/31  
 Santa Clara Elks Lodge  
 1680 Martin Ave.  
 Santa Clara, CA 95050

**Wednesday, October 10**

**11:30 AM - 12:30 PM**  
 Tax Support Group  
 City Diner  
 1160 Blossom Hill Road, San Jose  
 For information contact:  
 Beverly Haughton at (408) 356-4832.  
 RSVP by e-mail requested to:  
 khaughton@juno.com

**Saturday, October 20**

**9:00 AM to 12 Noon**  
 Mini Workshop Seminar  
 Topic: *Sales Tax*  
 Speaker: To be announced  
 Registration begins at 8:30 AM  
 Fee: \$35 before 9/1; \$40 after 8/31  
 Santa Clara Elks Lodge  
 1680 Martin Ave.  
 Santa Clara, CA 95050

**Tuesday, October 23**

**10:00 AM - 11:45 AM**  
 San Jose Board Meeting  
**11:45 AM - 1:30 PM**  
 San Jose Meeting - Maggiano's Little Italy in Santana Row in San Jose  
**Speaker:** Roger Oakland, FTB  
**Topic:** *California Audit Issues and Audit Process*

RSVP must be made by Thursday prior to the meeting to receive the \$25 price. All reservations after that or at the door will be \$30.

Please RSVP to the office at 800-832-MSEA (6732) or office@missioneas.org

**Tuesday, October 23**

**10:00 AM - 11:45 AM**  
 San Jose Board Meeting  
 11:45 AM - 1:30 PM  
 San Jose Meeting - Maggiano's Little Italy in Santana Row in San Jose  
**Speaker:** Roger Oakland, FTB  
**Topic:** *California Audit Issues and Audit Process*

RSVP must be made by Thursday prior to the meeting to receive the \$25 price. All reservations after that or at the door will be \$30.

Please RSVP to the office at 800-832-MSEA (6732) or office@missioneas.org

**6:00 PM - 8:00 PM**

Palo Alto Dinner Meeting  
 6:00 PM Registration  
 6:30 PM - 8:00 PM  
 Dinner and Presentation  
 Ming's Restaurant  
 1700 Embarcadero Road, Palo Alto  
**Speaker:** To be announced  
**Topic:** To be Announced  
**Dinner Fee:** \$30 in advance or \$35 at the door. RSVP:E-vite or contact MSEA office at 800-832-6732.

**Wednesday, October 24**

**6:30 PM - 8:30 PM**  
 Monterey Satellite Meeting  
 Lugano's Swiss Bistro in Carmel  
**Speaker:** To be Announced  
**Topic:** To be Announced  
**Cost:** \$20 for Dinner and 1 hour of CPE  
 Please RSVP to Bay Tax Service 831-392-0584

**Tuesday, October 30**

**8:30 AM - 5:00 PM**  
 All Day Seminar  
 Registration begins at 8:00 AM  
 3 terrific speakers, 4 important topics  
 Roxanne Nelsen  
*California Nonresident Return*  
 Irene Lawrence - *Ethics*  
 George Butts  
*Sale of Business Property*  
*Cost Segregation*

**Fee:** \$165 before 10/1/07  
 \$185 after 9/30/07

Santa Clara Elks Lodge  
 1680 Martin Ave.  
 Santa Clara, CA 95050