



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

December 2005 / Volume 1 / Issue 5

Board of Directors

President

Karen L. Fihn, EA

1st Vice President

George Pan, EA

2nd Vice President

Randy Warshawsky, EA

Treasurer

David Hatt, 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 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.

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

The December meeting is a time for fun. See who will receive the lifetime achievement award for this year. Enjoy time with your fellow EAs. Bid on great auction items. Some of our auction items are for fun, others are for business. And if you have an item that we can auction off please let George Vogel know.

We had a great practitioners panel meeting in November. We had representatives from both the IRS and FTB in attendance. The next practical panel meeting will be held on April 26, 2006.

Don't forget December 2nd is the last day to receive the early bird discount for Cast in Concrete. Get the latest updates for tax seasons.

Anyone interested in joining or forming a new tax interest group please contact James Houston.

Looking forward to seeing everyone at the December meeting.

Karen Fihn, EA,
President MSEA
408-551-6580

Monthly Meetings

San Jose Meeting

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

Speaker: None - Annual Holiday party with excellent lunch, music, and auction. The committee is asking for donations of items for the auction. If you have an item you wish to donate, please contact George Vogel@vogelbkk@sprynet.com

Topic: Annual Holiday Party
RSVP must be made by Thursday prior to the meeting to receive the \$20 price. All reservations after that or at the door will be \$25. Please RSVP to the office at 800-832-MSEA (6732) or office@missioneas.org.

Monterey Meeting

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

Speaker: (Note day change because of Christmas)
Presenter is Jon Pariser, Investment Representative with Linsco Private Ledger.

Answers to the many questions our clients ask us about taxable consequences of income from many different types of investments including annuities. Jon has an exceedingly developed sense of humor and I think you will like him especially at this holiday time of the year.

Please RSVP to Bill Westphal, EA 831-624-6200 or bill@twjohnston.com

INSIDE THIS ISSUE:

Board Minutes	2
In The News	2
Education.....	4
Calendar	5

Committee Chairs:

Audit

Jessie Singh, EA

Awards

Viola Nosinger, EA

Budget & Finance

David Hatt, 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 Vogel, EA,

Ethics and

Professional Conduct

Norma Foss, EA

Legislative Affairs

Mandana Bamdad, EA

Long Range Planning

George Pan, EA

Randy Warshawsky, EA

Membership

Tom Chun, 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 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

November 15, 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, Secretary Ted Danen, EA, Treasurer David Hatt, EA, CSEA Director Mandy Bamdad, EA, CSEA Director Myra J. Thompson, EA, Directors Rosemary Hernandez, EA, Ilse Beck, EA, Dorothy McGinley, EA, and James Houston, EA. Board member absent: Immediate Past President Andy Bonfield, EA, Second Vice President Randy Warshawsky, EA, Director Tom Chun, EA, Director Margy Dunn and Director Jessie Singh, EA. Guests: George Vogel, EA.

Minutes of the meeting were accepted as presented.

TREASURER'S REPORT: Was reviewed.

COMMITTEE AND ORGANIZATION REPORTS: Were presented.

OLD BUSINESS: No motions were made.

NEW BUSINESS: No motions were made.

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 December 20, 2005 at 10:00 AM at Maggiano's, in San Jose.

Respectfully Submitted,
Ted Danen, EA, Secretary

In The News

Free Marketing Material

Here are some free marketing material you can order for your practice. Form 11379 - Order Form:

http://www.irs.gov/pub/irs-utl/form11379_checkform.pdf

As promised below are the links to "E-file QuickAlert" every e-file provider should sign up for this free service:

<http://www.irs.gov/taxpros/providers/article/0,,id=97623,00.html>

<http://www.envoyprofiles.com/QuickAlerts/>

Check the links below for other updated e-file information.

The 2006 e-file Provider Marketing Tool Kit (Publication 3005) & Marketing Brochure (Publication 3867) have been distributed and updated on:

<http://www.irs.gov/taxpros/providers/article/0,,id=97538,00.html>

For Sale: Thomas Tax Seminar Home study course (2005) to study for the IRS exam, which also includes the review book. Price: \$25 per set. Contact Mission office at 1-800-832-6732 or Ilse Beck at 408-267-8234.

Large and varied San Jose tax practice seeking experienced tax preparer for upcoming tax season. Double entry bookkeeping and payroll knowledge required. Knowledge of Lacerte and Quickbooks a plus. Please respond with resume and contact information to kafeiblanco@yahoo.com.



Tax Help Needed

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

E-mail resumes with salary requirement to 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

Publication 3867, was mailed to current e-file Providers on October 21, 2005.

Publication 3005, was shipped to the National Distribution Center (NDC) on October 27, 2005, for new e-file Providers to order.

A stuffer was developed that Andover will include in the acceptance letters to new e-file Providers informing them about the FREE marketing tool kit. The stuffer includes the toll-free number so they can order it for themselves.

WHAT'S UP

In The News

Local Legislator Day

CSEA's 1st Local Legislative Day

SpEAk Tax and Have Your Voice HEArD!

CSEA needs every Member (that means YOU) to get involved in Local Legislative Day. During December CSEA is activating its grassroots program and the goal is to make sure every State Legislator is visited at their local district office by at least one Enrolled Agent. Don't let our Chapter be the reason this goal is not achieved.

Here is what we need YOU to do...

1. If you don't know who your legislators are, find out by checking <http://www.sen.ca.gov/~newsen/senators/senators.htm> and select "Your Senator" or contact CSEA at 800/777-2732. Remember your representatives are based on your home address, not your office. (This website will provide you with both your Senator and Assemblymember(s).)
2. Contact your Chapter Legislative Chair, Mandy Bamdad, EA, at 408-323-0104 or MPB424@AOL.COM and let her know that you are interested in participating and which legislator(s) you can visit. Or you can contact Bronwyn Hughes at CSEA at 800/777-2732 or bhughes@csea.org.
3. CSEA will provide interested Members with all the materials you need to schedule and make your visits.
4. Make the visit(s). You can make your visit(s) individually or in a group.
5. Follow up with CSEA and let them know who you visited. The follow up is critical so CSEA can track which legislators are visited.

Please do your part to make sure all 120 California Legislators know who Enrolled Agents are. If you have any questions please contact Mandy Bamdad, EA (Chapter Legislative Chair) at MPB424@AOL.COM, or Bronwyn Hughes at CSEA at 800/777-2732.

We need participation from as many Members as possible to make this successful. Please do your part to help spread the word on Enrolled Agents. *(At the end of the newsletter you will see a sheet listing our legislators and their district.)*

Postcards To Be Discontinued

Please respond to the editor if you find that the discontinuation of the postcard would effect you. Send your reply to: editor@missioneas.org

Thank you for your help.

Free IRS e-Services Seminars

Send me an e-mail to register and let me know if your attending both sessions or only morning or afternoon sessions.

The morning will cover *e-Services Registration, How to Delegate e-Services to practitioners and employees in your office and How to input Power of Attorneys online.*

The afternoon will cover *Transcript Delivery System (Transcripts, Record of Accounts, Getting W-2s, 1099s, 1098s etc) and Error Account Resolution (Notices, Installment Agreements, Refund Problems and etc).* See details below. Thanks!

Tax practitioners are invited to attend free two-hour seminars in San Jose discussing IRS e-Services. Learn how to use the Internet to view your clients' IRS tax records and resolve tax issues electronically from the convenience of your personal computer. Seminar details are as follows:

Date: December 8, 2005

Where: Lincoln Law School
One North First Street, (Downtown San Jose) Registration required by e-mail: James.r.Kinsey@irs.gov

Morning Session: 9:00-11:00 a.m
How to register for and delegate access to IRS electronic services, including how to use our new Disclosure Authorization application (online POAs instantly processed and approved!).

Afternoon Session: 1:00-3:00 p.m.
How to use our new e-Services applications for the Transcript Delivery System and Electronic Account Resolution system. Use the Internet to access your clients' IRS tax account information and resolve notice and refund and payment problems online!

Educational Events

CSEA/IRS Tax Practitioner Seminar

The State Chapter of the California Society of Enrolled Agents is hosting the annual CSEA/IRS Tax Practitioner Seminar with presentation from IRS Subject Matter Experts on hot topics of importance to tax professionals.

Topics:

- OIC & Partial Pay Installment Agreements
- e-Services
- Compliance
- The Examination Process
- Taxpayer Advocate Service

Location:

Embassy Suites, South San Francisco
250 Gateway Boulevard
South San Francisco, CA 94080
(650) 589-3400

Date & Time:

Friday, January 20, 2006
7:30 a.m. - Registration & Continental breakfast
8:30 a.m. - 4:00 p.m. - Program

Cost:

\$80 for CSEA Members before January 6, 2006 and \$95 after;

\$95 for non-Members before January 6, 2006 and \$110 after

Registration fee includes continental breakfast, lunch, and all course material.

(Any fees charged are by the practitioner organization and not the IRS)

CPE:

- CTEC 2509 - Fed 7 hours
- Calif. Board of Accountancy - 7 hrs.
- IRS/CSEA/NAEA: 7 hours

For more information, contact the California Society of Enrolled Agents at (916) 366-6646, or register online at www.csea.org.

2006 Cast-In-Concrete Seminar

California Update

Vicki L Mulak, EA, CFP

Morning Session:

8:30 am - 12:10 PM

2005 Tax Legislation

Conformity/Nonconformity

Credits, Non-Residents, BOE, EDD

Federal Update

Claudia Hill, EA, MBA

Afternoon Session:

1:10 PM - 4:50 PM

2005 Tax Legislation

A Forms Based Approach

When:

Monday, January 9th in Monterey

Tuesday, January 10th in Sunnyvale

Where:

In Monterey:

Embassy Suites

Seaside, 1441 Canyon Del Rey

(For further info contact Andrew Bonfield at 831-625-7681)

In Sunnyvale:

Radisson Inn

1085 East El Camino Real

Details and registration can be found on page 6 of this newsletter. For further info contact MSEA Office at 1-800-832-6272.

For more information on events and much more, check out our website at www.missionneas.org

December

Thursday - December 1

7:45 AM - 9:00 AM

Holders Country Inn

Contact: Marilyn MacNab 408-446-4451
or macnab@taxmam.com

11:30 AM - 12:30 PM

Estate and Trust, City Dinner

Contact: Randi Clarke EA 408-973-9300
RSVP requested by e-mail to:
randi_tax@yahoo.com

Wednesday - December 7

10:00 AM - 11:30 AM

VITA instructors meeting

The meeting will be held at the IRS office located at 55 S. Market St., 4th floor, Room 411, San Jose.

Contact Randy at 408-445-1151 or Randy@4taxman.com for additional info

11:30 AM - 12:30 PM

Effie's, 331 W Hacienda Ave, Campbell

Contact: Martin Lowe at 408-879-9469
e-mail at: martinlowecpa@sbcglobal.net
RSVP requested

Wednesday - December 14

11:30 AM - 12:30 PM

City Dinner

Contact: Beverly Haughton
408-356-4832 or khaughton@juno.com
RSVP by e-mail requested

Thursday - December 15

6:30 PM - 8:30 PM

Monterey Satellite Meeting

Lugano's Swiss Bistro in Carmel

(Note day change because of Christmas)

Presenter is Jon Pariser, Investment Representative with Linsco Private Ledger.

Answers to the many questions our clients ask us about taxable consequences of income from many different types of investments including annuities. Jon has an exceedingly developed sense of humor and I think you will enjoy him, especially at this holiday time of the year.

Please RSVP to Bill Westphal, EA
831-624-6200 or bill@twjohnston.com

Tuesday - December 20

10:00 AM - 11:30 AM

Board Meeting MSEA

11:30 AM - 11:45 AM

Social Time

11:45 AM - 1:15 PM

San Jose Meeting

Maggiano's Little Italy in San Jose

Speaker: None - Annual Holiday party with excellent lunch, music, and auction.

The committee is asking for donations of items for the auction. If you have an item you wish to donate, please contact George Vogel at vogelbkk@sprynet.com

Topic: Annual Holiday Party

RSVP must be made by Thursday prior to the meeting to receive the \$20 price. All reservations after that or at the door will be \$25.

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

January

Wednesday - January 04

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 - January 05

11:30 AM - 12:30 PM

Estate and Trust, City Dinner

Contact: Randi Clarke EA
408-973-9300

RSVP requested by email to randi_tax@yahoo.com

Saturday - January 07

8:00 AM - 5:00 PM

CSEA meeting in Sacramento see CSEA website for better details

Sunday - January 08

8:00 AM - 5:00 PM

CSEA meeting in Sacramento see CSEA website for better details

Monday - January 09

8:00 AM - 8:30 AM Registration

8:30 AM - 5:00 PM

Cast in Concrete with Claudia Hill and Vicki Muilek - Monterey will be held at Embassy Suites Seaside, 1441 Canyon Del Rey (includes Continental Breakfast and Lunch)

Tuesday - January 10

8:00 AM - 8:30 AM Registration

8:30 AM - 5:00 PM Cast in Concrete with Claudia Hill and Vicki Muilek - Radisson Inn Sunnyvale 1085 East El Camino Real Sunnyvale, CA 94087 (includes Continental Breakfast and Lunch)

Wednesday - January 11

11:30 AM - 12:30 PM City Dinner

Contact: Beverly Haughton 408-356-4832 khaughton@juno.com
RSVP by e-mail requested

Tuesday - January 17

10:00 AM - 11:30 AM

Board Meeting MSEA

11:30 AM - 11:45 AM

Social Time

11:45 AM - 1:15 PM

San Jose Meeting Maggiano's Little Italy in San Jose

Speaker: Steve Sibley, Esq

Topic: New Bankruptcy Laws - How do they affect our clients and their taxes

RSVP must be made by Thursday prior to the meeting to receive the \$20 price. All reservations after that or at the door will be \$25. Please RSVP to the office at 800-832-MSEA (6732) or office@missioneas.org

Wednesday - January 18

6:30 PM - 8:30 PM

Monterey Satellite Meeting

Lugano's Swiss Bistro in Carmel

Speaker: Estates & Trusts presenter Yvonne Ascher, Attorney at Law

Her many years experience in estate & trust matters as they relate to tax returns will be shared also update on the major changes in California State Estate tax returns no longer required but?

Please RSVP to Bill Westphal, EA
831-624-6200 or bill@twjohnston.com

2006 Cast-In-Concrete Seminar

Monday, January 9th in Monterey

Tuesday, January 10th in Sunnyvale

California Update

Federal Update

Vicki L Mulak, EA, CFP

Morning Session

8:30 am - 12:10 pm

2005 Tax Legislation

Conformity/Nonconformity

Credits, Non-Residents, BOE, EDD

Vicki Mulak regularly speaks to Chapters of CSEA and CA Society of Tax Consultants on California tax law and other tax related topics. She was a featured speaker at NAEA's NTEI 2003 and the 2003 CSEA Super Seminar.

She owns American Financial and Tax in Tustin and has taught Special Enrollment Exam classes for the Orange County Chapter of CSEA for the last twelve years.

She represents the California Society of Tax Consultants on EDD's Small Business Employer's Advisory Committee.

Vicki appeared on the IRS' web cast "Tax Talk Today" in December, 2004.

In 1996 she received the U.S. Small Business Administration's "Accountant Advocate of the Year" Award for her excellent support of the local business community.

Claudia Hill, EA, MBA

Afternoon Session

1:10 pm - 4:50 pm

2005 Tax Legislation

A Forms Based Approach

Claudia Hill is a nationally recognized tax professional and frequent lecturer on taxation of individuals and representation before the IRS. She is Editor in Chief of the CCH, Inc. "Journal of Tax Practice & Procedure" and a Contributing Author to Thomson-PPC's "Guide to Dealing with the IRS" and CCH "1040 Express." Ms. Hill has testified before both the Senate Finance Committee and House Ways & Means Committee on tax issues, including tax law complexity and the AMT. She is often called upon by the media for comment about tax issues. In March, 2005 Claudia was invited by the President's Tax Reform panel to present testimony on the individual AMT.

Ms Hill is owner and principal of Tax Mam, Inc., an association of Enrolled Agents in Cupertino, CA.

***In Monterey* Embassy Suites Seaside, 1441 Canyon Del Rey**

(For further info contact Andrew Bonfield at 831-625-7681)

***In Sunnyvale* Radisson Inn, 1085 East El Camino Real**

(For further info contact MSEA Office at 1-800-832-6272)

Registration 8:00 am / 1:00 pm (CPE to 8 Hrs) Includes Continental Breakfast & Lunch (Full-Day price includes lunch)

Cancellation Policy: To qualify for a refund, fax or call at least 48 hours prior to function. No cash refunds will be provided. A credit voucher will be issued good towards any MSEA function within one year of this function.

Name _____

EA PA CPA ATTY CTEC Lic # _____

Address _____

City/State/Zip _____

Phone _____ Fax _____

Vegetarian Nickname for Badge _____

Check Visa MasterCard

Acct # _____ Exp ____/____

Signature _____

Mail to: MSEA, 1475 So. Bascom Ave, Suite 206, Campbell, CA 95008
FAX Charge to: 408-371-8677 or email "office@missioneas.org"

Jan 9 - Monterey Jan 10 - Sunnyvale

Both California Federal

C-I-C EARLY BIRD SPECIALS

POSTMARKED BY DECEMBER 2, 2005

ONE BOTH

CSEA Members/Staff	\$85	\$165
NonMembers	\$90	\$175

C-I-C REGULAR FEES

ONE BOTH

CSEA Members/Staff	\$95	\$180
Non-Members	\$100	\$190

ATTACH MSEA DISCOUNT COUPON

MSEA USE: Date Rcvd

AMT

CHECK

CALIFORNIA STATE SENATE REVENUE AND TAXATION COMMITTEE		Phone #	EA CONTACT	CONTACT INFORMATION FOR REV. & TAXATION
MEMBER NAME	DISTRICT			
Senator Michael Machado (Chair)	5	916-323-4306		Consultants: Martin Helmke & Gayle Miller Assistant: Marisa Lanchester Phone # 916-651-4119 Room 408
Senator Robert Dutton (Vice-Chair)	31	916-651-4031		
Senator Elaine Alquist	13	916-651-4013		
Senator Debra Bowen	28	916-651-4028		
Senator Gilbert Cedillo	22	916-651-4022		
Senator Charles Poochigian	14	916-651-1014		
Senator George Runner	17	916-651-4017		
Senator Jack Scott	21	916-651-4021		
CALIFORNIA STATE SENATE BUSINESS & PROFESSION COMMITTEE		Phone #	EA CONTACT	CONTACT INFORMATION FOR BUSINESS & PRFESSION
MEMBER NAME	DISTRICT			
Senator Liz Figueroa (Chair)	10	916-651-4010		Consultants: Bill Gage, Jay DeFuria, V.Ayers,Doug Brown and Robin Hartley Assistant: Kathy Sullivan, Phone # 916-651-4104, Room 2053
Senator John Campbell (Vice-Chair)	35	916-651-4035		
Senator Samuel Aanestad	4	916-651-4004		
Senator Dean Florez	16	916-651-4016		
Senator Bill Morrow	38	916-651-4038		
Senator Kevin Murray	26	916-651-4026		
Senator Joe Simitian	11	916-445-6747		
CALIFORNIA STATE ASSEMBLY REVENUE & TAXATION COMMITTEE		Phone #	EA CONTACT	
MEMBER NAME	DISTRICT			
John Klehs (Chair)	18	916-319-2018		Phone # 916-319-2098
Mimi Walters (Vice-Chair)	73	916-319-2073		
Joseph Canciamilla	11	916-319-2011		
Judy Chu	49	916-319-2049		
Chuck DeVore	70	916-319-2070		
Dave Jones	9	916-319-2009		
Sally J. Lieber	22	916-319-2022		
CALIFORNIA STATE ASSEMBLY BUSINESS & PROFESSION COMMITTEE		Phone #	EA CONTACT	
MEMBER NAME	DISTRICT			
Gloria Negrete McLeond (Chair)	61	916-319-2061		
Shirley Horton (Vice-Chair)	78	916-319-2078		
Karen Bass	47	916-319-2047		
Dario Frommer	43	916-319-2043		
Paul Koretz	42	916-319-2042		
Bill Maze	34	916-319-2034		
Joe Nation	6	916-319-2006		
Van Tran	68	916-319-2068		
Juan Vargas	79	916-319-2079		
Leland Yee	12	916-319-2012		