



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

February 2008 / Volume 4 / Issue 2

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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

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President's Communication

It is here. Yes I know it seems like tax season just ended. Well I guess it did if you consider a lot of the clients think the filing date is really Oct 15th.

This is short and sweet. There will be no meeting for San Jose in February and March for San Jose and Monterey. Palo Alto is having a February meeting with Sharon Kreider, EA, CPA the speaker.

In April San Jose meeting will resume with our time honored social hour. Come talk about the wildest story you got from a client. Tell us what advice the Hair dressers and Barbers are giving out.

We will be giving a prize for the largest W-2 over \$1 million dollars without stock sales. Please black out the confidential informa-

tion (name, ss#) before bring the W-2 to the meeting.

I want to thank Dorothy McGinley, EA who has been our newsletter editor; this will be her last newsletter. That reminds me we are looking for a volunteer to take over this duty.

Good Luck on another successful season.

Thanks,
Randy Warshawsky, EA
President 2007-2008

Welcome New Members!

Carol Guarino Hollister...12/27/2007
May Hsiao EA Cupertino.12/31/2007

February Anniversaries

2/26/1982 Karen Owen EA CFP
 2/5/1985 Varsha Vyas EA
 2/10/1986 Walter Saltzman EA
 2/17/1987 Janet Grindy EA
 2/2/1988 Doris Altman EA
 2/8/1988 Thomas Shafer EA
 2/17/1989 Dan Olmstead EA CFP
 2/11/1992 David Schwartz EA
 2/17/1993 David Hatt EA CFP
 2/2/1995 Donald Byfield EA
 2/13/1995 Jeffery Cambra EA
 2/23/1995 Dieter Kaelker EA
 2/5/1997 Diana Redfern EA CFP
 2/26/1997 Marilyn MacNab EA
 2/27/1997 Ted Johnston EA
 2/8/1999 Danny Nguyen EA
 2/8/1999 George Vogel EA
 2/9/2004 Fred Evans EA
 2/15/2005 Julia Falknor
 2/14/2007 Robert Dougherty
 2/26/1982 Karen Owen EA CFP
 2/5/1985 Varsha Vyas EA
 2/10/1986 Walter Saltzman EA

Monthly Meetings

San Jose Meeting

3rd Tuesday of the Month at 11:30 AM
Maggiano's Little Italy, Santana Row, San Jose
No San Jose Meeting For Feb. or March.

Monterey Meeting

3rd Thursday of the Month at 12:00 Noon
Tarp's Roadhouse
2999 Monterey Salinas Hwy., Monterey
No Monterey Meeting For Feb. or March.

Palo Alto Meeting

4th Tuesday of the Month at 6:30 PM
Ming's Restaurant
1700 Embarcadero Road, Palo Alto
Speaker: Sharon Kreider
Topic: To Be Announced

Committee Chairs:

Awards

Viola Nisonger, 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

Dorothy Lang, 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 Haddock, EA

Susan Knowles, EA

Review (Formerly Audit)

Vacant

Scholarships

Jessie Singh, EA

Tax Support & Special Interest Groups

James Houston, EA

Contact information for any of the chairs listed above is available on the web site in the MSEA board area.

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
650-212-1040

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.

Public Information & Awareness (PIA)

The PIA (Public Information & Awareness) Committee is looking for volunteer speakers in 2007-2008 to introduce and promote the designation of EA at Professional Group meetings of Real Estate Agents, Loan Brokers, Attorneys, Financial Planners and other professionals. At the meetings the EA speaker would either open or close a meeting with an introduction, how to find an EA in their area and then briefly mentioning tax forms and common tax terms heard in their specific field but not always fully understood. Letting them know that EA's have prepared complex tax returns with 1031 Exchanges, Cost Basis, Gift Tax, Loans from retirement accounts, Employee Stock Option Plans, Energy credits for efficient appliances, Home exclusion and Rental conversions. We have not set up appointments with these businesses we plan to match the speaker to each professional group.

If you are interested in volunteering the speaking should be 15-20 minutes of your time. Please contact Laura Haddock at PLTax@aol.com. Please include the type of profession you would like to speak to if you have a preference and the demographic area and times you are available.

Help Wanted:

**EA READY TO HELP DURING
AND AFTER TAX SEASON 2007**

**with 4 years experience in Taxes
and 10 years experience in Book-
keeping/Payroll. Lacerte and Quick-
books. Full or part time in Santa
Cruz/Watsonville area. Email: patri-
ciab-ea@sbcglobal.net**

phone: 831-234-1164



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

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)

C A L L E N D A R

February

Wednesday, February 6

11:30AM – 12:30PM

Effie's, 331 W. Hacienda Ave, Campbell
Contact: Martin Lowe, (408) 879-9469
or e-mail at: martinlowecpa@sbcglobal.net - RSVP requested.

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

Thursday, February 7

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

Wednesday, February 13

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

Thursday, February 14

11:30 AM – 12:30 PM

Special Interest Group
General Tax and Practice Mgmt
Holder's Country Inn

988 S. DeAnza Blvd., San Jose
RSVP by e-mail requested
Contact: Sonya Meissner
(408) 257-9134 or
sonya_meissner@yahoo.com

Tuesday, February 19

10:00 AM - 11:45 AM

No San Jose meeting in February and March

Wednesday, February 20

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

Thursday, February 21

12 Noon – 1:30 PM

No Monterey meeting in February and March

Tuesday, February 26

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: Sharon Kreider

Topic: To Be Announced

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

RSVP: e-vite or contact Jill Mendenhall at (408) 617-0391.

Wednesday, February 27

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

March

Wednesday, March 5

11:30AM – 12:30PM

Effie's, 331 W. Hacienda Ave, Campbell
Contact: Martin Lowe (408) 879-9469
e-mail: martinlowecpa@sbcglobal.net
RSVP requested.

Wednesday, March 5

11:30 AM - 12:30 PM

Tax Support Group
Location: To Be Announced
For information Contact:
Beverly Haughton at (408) 356-4832.
RSVP by e-mail requested to:
khaughton@juno.com

Thursday, March 6

11:30 AM - 12:30 PM

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

Wednesday, March 12

11:30 AM - 12:30 PM

Tax Support Group
Location: To Be Announced
For information contact:
Beverly Haughton at (408) 356-4832.
RSVP by e-mail requested to:
khaughton@juno.com

Thursday, March 13

11:30 AM – 12:30 PM

Special Interest Group
General Tax and Practice Mgmt
Holder's Country Inn

988 S. DeAnza Blvd., San Jose
RSVP by e-mail requested
Contact: Sonya Meissner
(408) 257-9134 or
sonya_meissner@yahoo.com

Tuesday, March 18

10:00 AM – 11:45 AM

No San Jose Meeting

Wednesday, March 19

11:30 AM - 12:30 PM

Tax Support Group
Location: To Be Announced
For information contact:
Beverly Haughton at (408) 356-4832.
RSVP by e-mail requested to:
khaughton@juno.com

Thursday, March 20

12 Noon – 1:30 PM

No Monterey Meeting

Tuesday, March 25

6:00 PM – 8:00 PM

No Palo Alto dinner meeting

Wednesday, March 26

11:30 AM - 12:30 PM

Tax Support Group
Location: To Be Announced
For information contact:
Beverly Haughton at (408) 356-4832.
RSVP by e-mail requested to:
khaughton@juno.com

April

Wednesday, April 2

11:30AM – 12:30PM

Effie's, 331 W. Hacienda Ave, Campbell
Contact: Martin Lowe, (408) 879-9469
or e-mail at:
martinlowecpa@sbcglobal.net
RSVP requested.

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11:30 AM - 12:30 PM

Tax Support Group
Location: To Be Announced
For information contact
Beverly Haughton at (408) 356-4832.
RSVP by e-mail requested to
khaughton@juno.com

Thursday, April 3

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

C A L E N D A R

<p>Wednesday, April 9 11:30 AM - 12:30 PM Tax Support Group Location: To Be Announced For information contact Beverly Haughton at (408) 356-4832. RSVP by e-mail requested to khaughton@juno.com</p> <p>Thursday, April 10 11:30 AM - 12:30 PM Special Interest Group General Tax and Practice Mgmt Holder's Country Inn 988 S. DeAnza Blvd., San Jose RSVP by e-mail requested Contact: Sonya Meissner (408) 257-9134 or sonya_meissner@yahoo.com</p>	<p>Wednesday, April 16 11:30 AM - 12:30 PM Tax Support Group Location: To Be Announced For information contact Beverly Haughton at (408) 356-4832. RSVP by e-mail requested to khaughton@juno.com</p> <p>Thursday, April 17 12 Noon - 1:30 PM Tarpy's Roadhouse, Monterey 2999 Monterey Salinas Highway Speaker: To be announced Topic: To be announced Cost: \$20 MSEA members / \$25 non-members Please RSVP: Bay Tax Service (831) 392-0584</p>	<p>Tuesday, April 22 10:00 AM - 11:45 AM San Jose Board Meeting</p> <p>11:45 AM- 1:30 PM San Jose Meeting - Maggiano's Little Italy in Santana Row, San Jose Post tax season party No speaker, no agenda Come join us after tax season to unwind with fun and games</p> <p>#####</p> <p>6:00 PM - 8:00 PM Palo Alto dinner meeting 6:00 PM Registration</p> <p>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 of \$35 at the door RSVP: e-vite or contact Jill Mendenhall at (408) 617-0391.</p>
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Established tax office in Hayward is Seeking 2008 Tax Season!

RD's Tax & Financial Strategies in Campbell is seeking multiple Tax Review Assistants to help keep Tax Season running smoothly. The temporary positions will start on February 1, 2008 and end on April 15, 2008. However, there is potential for a permanent position in the firm.

No prior tax experience is required - we are willing to train. Flexible hours are available. We are able to work with college student schedules!

Desired Skills:

- Self-starter with a great work ethic
- Computer literate
- Working knowledge of Microsoft Word and • Excel
- Experience with Lacerte tax preparation software is a very big plus, but not required
- Sense of humor

Please fax a cover letter and current resume to:
Fax: 408-879-9184 - Attn: Office Manager