



# Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

July 2006 / Volume 2 / Issue 3

## Board of Directors

### President

George Pan, EA

### President Elect

Randy Warshawsky, EA

### 2nd Vice President

Mandy Bamdad, EA

### Treasurer

James Houston, EA

### Secretary

Ted Danen, EA

### Immediate Past President

Karen Fihn, EA

### CSEA Directors

#### 1 Year Term

David Hatt, EA

#### Directors - Second Year of Two Year Term

Margy Dunn, EA

Dorothy McGinley, EA

Rosemary Hernandez, EA

#### Directors - First Year of Two Year Term

Jessie Singh, EA

Myra Thompson, EA

Ilsa Beck, EA

Alan Pinck, 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  
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www.missioneas.org  
office@missioneas.org

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## President's Communication

Thank you to Karen Fihn, as well as the 30 past presidents, for their incredible achievements in making Mission Society the great chapter it is today. Without their hard work and outstanding accomplishments, I would not be standing here today. Congratulations to George Vogel as EA of the Year, James Houston as Rookie of the Year, Brian Vogel as EA Booster, Irene Lawrence has been elected as the President of CSEA, and David Hatt has also been elected as the Treasurer/Secretary of NAEA. Both Irene Lawrence and David Hatt are the members of MSEA, we are so proud of them.

During my tenure, I wish to focus on three areas of communication; members, non-members; community outreach and awareness.

First, communicating with members: Currently MSEA has 395 members; we all know our society is a membership-based society with volunteers; emphasizing member benefits and needs will be our first priority. Please let us know anytime if there is anything you wish for us to do for you. In the meantime, we need more volunteers to participate in our various committees and share more wisdom on how to do a better job for our members.

Second, communicating with potential members: According to CSEA data, only 41% Enrolled Agents join our society. In another word, there are 59% Enrolled Agents who are potential members. CSEA is challenging us to increase membership 30% by June 30th, 2007. The membership committee needs to develop good strategies to attract other Enrolled Agent to become our member.

Third, communicating with the local communities: Enrolled Agent, Tax Attorney and Certified Public Accountant, all belong to Tax Practitioners, but Enrolled Agent is the only Federally Authorized Tax Practitioner, and we are the only "The Tax Professional!" It is really important for us to let the general public people know just how good we are. Getting to know each other, understanding each other, and build a friendly relationship with the local communities and professional associations is our major goal. We need to outreach. When the general public people think about a Tax Professional, we want them to think of MSEA and its members. This will help us not only increase our membership, but potential help our members increase their business.

Thanks to George Vogel has great luncheon program for the July 18 meeting; the speaker will be our well-known member Claudia Hill, EA. She will be speaking on "Disclosure form 7216, what's the big deal", and her crystal ball projection for the balance of 2006.

Hope to see you all at the July meeting.

*George Pan, EA*

*President of MSEA*

*Phone: (408) 727-8011*

*Email: panpadgett@comcast.net*

## New SIG group!

See page 2 for details

## 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:** Claudia Hill, EA

**Topic:** *10 Things I Learned in the Last Filing Season and What to Look Forward to in the Next Year.*

### Monterey Meeting

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

Ron Ricard, Certified Exchange Specialist

**Topic:** *1031 Exchanges*

## Committee Chairs:

### Audit

John Oliver, EA

### Awards

Viola Nosinger, EA

### Budget & Finance

David Hatt, EA  
James Houston, EA  
Joseph Salazar, EA  
Khorshed Alam, EA

### By Laws

Rosemary Hernandez, EA

### Communications

/Newsletter  
Randy Warshawsky, EA  
James Houston, EA  
Dorothy McGinley, EA

### CTEC Representative

Gregory Steinbis, EA

### Disaster Service

Karen Fihn, EA

### Education

George Vogel, EA,

### Ethics and

### Professional Conduct

Norma Foss, EA

### Legislative Affairs

Joseph Salazar, EA

### Long Range Planning

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

Jessie Singh, 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

June 20, 2006

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

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, Treasurer David Hatt, EA, CSEA Director Myra J. Thompson, EA, Directors Dorothy McGinley, EA, Jessie Singh, EA, Margy Dunn, EA, Ilse Beck and James Houston, EA. Board members absent: CSEA Director Mandy Bamdad, EA, Immediate Past President Andrew Bonfield, EA, and Directors Tom Chun, EA and Rosemary Hernandez, EA. Guests: CSEA President Irene Lawrence, EA, George Vogel, EA and Vi Nisonger, EA.

Minutes of the last meeting were accepted as presented.

TREASURER'S REPORT: Financial Statements were reviewed.

COMMITTEE AND ORGANIZATION REPORTS: Were presented.

OLD BUSINESS: No motions were made.

NEW BUSINESS: A motion was made and passed that MSEA administer a SEE Class in summer 2006 provided that we can break even or better. A second motion was made and passed that MSEA doesn't hold a SEE Class in 2006.

ADJOURNMENT: There being no further business, the board meeting was adjourned at 11:45AM by President Karen Fihn, EA. The next meeting is scheduled for July 18, 2006 at 10:00AM at Maggiano's, in San Jose.

Respectfully Submitted,  
*Ted Danen, EA, Secretary*

## New SIG Group!

The Practice Management SIG will focus on introducing best practices for new tax businesses and problem solving for established practices utilizing current members of MSEA and other professionals. The SIG will meet monthly with a speaker scheduled for alternating months giving members an opportunity to share what has (and has not) worked for them on months between speakers. We will address such topics as marketing, client selection, services to offer, contracts, office management/set-up, using third party preparers and other topics as selected by SIG members.

If you are interested, please contact Jill Mendenhall at (408) 617-0391 or send an e-mail to [mendenhalltaxes@yahoo.com](mailto:mendenhalltaxes@yahoo.com) for time and location.

## Practice Wanted

Experienced EA would like to purchase tax only practice in Santa Clara county. All cash or terms. Seller may join firm or sell with no recourse for client retention. Call (408) 286-8483 or [Phil@adaloninc.com](mailto:Phil@adaloninc.com).



### 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.

## Year Round

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](mailto:HRAdmin@4taxman.com)

# WHAT'S UP

## In The News

### Do you remember when you first became an EA?

I do and was lost.

How would you like to become a MENTOR for one of our new members?

Here is the idea,

- If you have been an EA for a while, volunteer to help out a new MSEA member learn what MSEA can do for them and be their support.
- If you are a new EA, let one of us that have learned the hard way make it a little easier for you.

You know we have all done in all areas of our personal and profession life. What is your time commitment, as little as 1 hour in a year to as much as you would enjoy giving.

This connection will probably benefit both the new and established member for years to come.

If you are interested please contact Randy Warshawsky at [Randy@4taxman.com](mailto:Randy@4taxman.com) or 408-445-1151.

**WANTED** items for this years holiday party auction. The more items we have the more money we can raise and the more fun we will have. We will be happy to auction off that nice bottle of wine you will never open or a pair of your season sharks, 49er's or theatre tickets we will even auction off that 1950 rolls royce you have on blocks in your garage. If you think it will sell please donate it to MSEA. Remember all proceeds go to keeping our association alive. If you have something to donate please contact Alan Pinck, EA at (408) 298-7199 or [axkid@pacbell.net](mailto:axkid@pacbell.net).

### Attention Monterey Area Members

You have a new number for making you reservation for the Monterey Meeting. Please RSVP to Bay Tax Service at (831) 392-0584 or [taxpro@baytaxservice.com](mailto:taxpro@baytaxservice.com).

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

### July Lunch Speaker:

We are pleased to announce that the July speaker will be our own Claudia Hill, EA.

She will be speaking on: *10 Things I Learned in the Last Filing Season and What to Look Forward to in the Next Year*, and her crystal ball projections for the balance of 2006.

Make sure you RSVP early so we can get a room large enough to handle everyone. I know you will not want to miss Claudia's speech.

Here is a short bio on her.

Claudia Hill, EA, MBA is a nationally recognized tax professional and frequent lecturer on taxation of individuals and representation before IRS. She is Editor in Chief of the CCH, Inc. *Journal of Tax Practice & Procedure* and a Contributing Author of CCH's 1040 Express Answers and Thomson-PPC's *Guide to Dealing with the IRS*. Ms. Hill has testified before both the Senate Finance Committee and House Ways & Means Committee on tax issues, including tax law complexity and the Alternative Minimum Tax. In March 2005, Claudia was invited to testify about the individual AMT at the President's Tax Reform Panel. She is often called upon by the media for comment about tax issues. She served on the 1987 Commissioner's Advisory Group to the National Office of the Internal Revenue Service.

Ms. Hill is owner and principal of Tax Mam, Inc., an association of Enrolled Agents in Cupertino, CA. Tax Mam, Inc./Tax Services Group offers quality tax return preparation, advisory and controversy representation services to small business and individual taxpayers.

# C A L L E N D A R

## July

### **Wednesday - July 05**

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

### **Thursday - July 06**

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

### **Wednesday - July 12**

11:30 AM - 12:30 PM  
City Dinner  
**Contact:** Beverly Haughton  
408-356-4832  
khaughton@juno.com  
RSVP by e-mail requested

8:00 AM - 9:00 AM  
Practice Management SIG  
SIG meetings - 2nd Wed. of each month  
at Coco's Restaurant, 1260 Oakmead  
Pkwy (corner of Lawrence Expressway  
and Oakmead Pkwy, off Hwy 101). Meet-  
ings start at 8:00 a.m. and last for 1 hour.  
If you are interested in attending or would  
like to speak at one of the meetings,  
please contact Jill Mendenhall at (408)  
617-0391 or send an email to menden-  
halltaxes@yahoo.com.

### **Tuesday - July 18**

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:** Claudia Hill, EA  
**Topic:** *10 Things I Learned in the Last  
Filing Season and What to Look Forward  
to in the Next Year.*

Please note the new lunch prices take  
effect as of this meeting.

### **Wednesday - July 26**

6:30 PM - 8:30 PM  
Monterey Satellite Meeting  
Lugano's Swiss Bistro in Carmel  
**Speaker:** Ron Ricard,  
Certified Exchange Specialist  
  
**Topic:** *1031 Exchanges*  
**RSVP:** Bay Tax Service at 831-392-0584

## August

### **Wednesday - August 02**

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

### **Thursday - August 03**

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

### **Wednesday - August 09**

11:30 AM - 12:30 PM City Dinner  
**Contact:** Beverly Haughton  
408-356-4832 or khaughton@juno.com  
RSVP by e-mail requested

8:00 AM - 9:00 AM  
Practice Management SIG, 2nd Wed. of  
each month at Coco's Restaurant, 1260  
Oakmead Pkwy. Meetings start at 8:00  
a.m. and last for 1 hour. If you are inter-  
ested in attending or would like to speak  
at one of the meetings, please contact Jill  
Mendenhall at (408) 617-0391 or send an  
email to mendenhalltaxes@yahoo.com.

### **Tuesday - August 15**

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  
Maggiano's Little Italy in San Jose  
**Speaker:** Arlette Lee, IRS Criminal  
Investigation Div.  
**Topic:** CID procedures, current targets,  
results of activities, etc.  
  
RSVP by Thursday prior to the meeting  
to receive the \$25 price. Reservations  
after that or at the door will be \$30. Please  
RSVP to the office at 800-832-MSEA  
(6732) or office@missioneas.org

### **Thursday - August 17**

10:30 AM - 2:30 PM  
Practitioner Liaison Meeting (PLM)  
2095 Park Av., San Jose  
A free Lunch will be served so please  
RSVP: Mission Office (800) 832-6732 or  
office@missioneas.org.

### **Wednesday - August 23**

7:30 PM - 9:30 PM  
Monterey Satellite Meeting  
Lugano's Swiss Bistro in Carmel  
**Speaker:** To Be Announced  
**RSVP:** Bay Tax Service at 831-392-0584

## September

### **Wednesday, September 06**

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, September 07**

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

### **Wednesday, September 13**

11:30 AM - 12:30 PM  
City Dinner  
**Contact:** Beverly Haughton (408) 356-  
4832 or khaughton@juno.com  
RSVP by e-mail requested

8:00 AM - 9:00 AM  
Practice Management SIG  
SIG meetings - 2nd Wed. of each month  
at Coco's Restaurant, 1260 Oakmead  
Pkwy. Meetings start at 8:00 a.m. and  
last for 1 hour. If you are interested in  
attending or would like to speak at one  
of the meetings, please contact Jill Men-  
denhall at (408) 617-0391 or send an  
email to mendenhalltaxes@yahoo.com.

### **Tuesday, September 19**

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  
Maggiano's Little Italy in San Jose  
**Speaker:** To be Announced  
**Topic:** To be Announced  
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.

### **Wednesday, September 27**

6:30 PM - 8:30 PM  
  
Monterey Satellite Meeting - Lugano's  
Swiss Bistro in Carmel  
**Speaker:** To be Announced  
**Topic:** To be Announced  
Please RSVP to Bay Tax Service 831-  
392-0584 or by e-mail to  
taxpro@baytaxservice.com.