



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

July 2007 / Volume 3 / Issue 5

Board of Directors

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of Two Year Term

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of Two Year Term

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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.

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Campbell, CA 95008

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Fax: (408) 371-8677

www.missioneas.org

office@missioneas.org

President's Communication

Ok I was installed on the 19th and already leaving for Ventura (CSEA meeting) today the 21st and have to have the presidents comments for next months newsletter out by the 22nd.

So the good news is nothing has gone wrong with me as President so far, 2 days down and 363 to go.

What do I want to see for MSEA this year?

I would like to see the organization become more valuable for each and every member. How we do that is by supplying you with what you want! We have made some changes in the past few years. We want to make more changes but need your input as to what would make MSEA more valuable to you and your practice.

If you have any comments or suggestions you can send them to me by e-mail at Randy@4taxman.com.

One of the member benefits you should check out is our education offerings. Watch the website as the dates are finalized and posted. www.missioneas.org (Bookmark this)

Thank you to last year's board for the hard effort; it was the first year our organization ran in the black in a few years. It took hard work and looking for alternative solutions to some of the chapter's needs.

Thank you to this year's board. We have a lot of new board members and I am looking forward to a fresh look at some of our chapters challenges.

And finally thank you to you the members for putting your trust in me.

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 last month.

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: Marc Blakeney of Equitas Capital

Topic: *Techniques to maximize client real estate deductions*

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: Leonard Williams, CPA EA

Topic: *Common Client Misunderstandings and How to Respond*

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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

June 19, 2007

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

Roll call was taken. Board members present: President George Pan, EA, President Elect Randy Warshawsky, EA, Vice President Myra Thompson, EA, Secretary Ted Danen, EA, Immediate Past President & CSEA Director Karen Fihn, EA, CSEA Director David Hatt, EA, Directors Jessie Singh, EA, Ilse Beck, EA, Sam Trinh, EA, John Oliver, EA, Alan Pinck, EA, Dorothy McGinley, EA, Margy Dunn, EA and Russell Barnett, EA. Board member absent: Treasurer James Houston, EA.

Visitor: Viola Nosinger, 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 to approve and prepay the contract with Elan Studios for \$3,240.00.

A motion was made and passed to approve an expenditure of \$2,200.00 for the printing and mailing of the 2007 educational flyer.

A motion was made and passed to proceed with the presentation of the SEE Class as long as there is no more than a \$2,500.00 loss.

ADJOURNMENT: There being no further business, the board meeting was adjourned at 11:45 AM by President George Pan, EA. The next meeting is scheduled for July 17, 2007 at 10:00 AM at Maggiano's, in San Jose.

Respectfully Submitted,
Ted Danen, 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

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 and 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

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

2007 Preparation Classes for Special Enrollment Exam

Presented by:
Mission Society of Enrolled Agents



Part I *Individuals*
Dates: July 28, August 4, 11

Break to take exam on Part 1

Part II *Business*
Dates: Aug. 25, Sept. 8, 15, 22

Break to take exam on Part 2

Part III
Representation, Practice, Procedures

Dates: October 6, 13, 20

Break to take exam on Part 3

Time: Saturdays 9:00 am to 3:30 pm (Lunch not provided)

Locations: Telesky Financial Services & Rosemary Hernandez & Associates

2095 Park Ave San Jose, CA 95126

Instructors: Alan Pinck EA, Arnie Pinck EA, Dorothy Lang EA, & Rick Hillsbery EA,

Class Fees: Part I - \$225
Part II - \$225
Part III - \$225
All three parts - \$600

Early Bird Discount register by June 12 - **\$525**. Text Books included in class fee.

To register call: MSEA (800)832-6732 or fax form to (408)371-8677

Scholarships available: Contact MSEA website www.missioneas.org

To apply for Enrollment: www.irs.gov/tax pros/agents

To schedule exam: www.prometric.com/irs

For more information contact Ilse Beck at (408)267-8234 or ilsebeck@ips.net.

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.

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

If they see enough interest and understand why, maybe we can get a tour of the service center.

If the text of the e-mail tell James what you would be interested in seeing and why.

CSEA Report

Have you ever had a tax exempt question? Do you do Non-Profit tax returns? Then you may want to sign up for CSEA Audio Tax program on July 11. You will be able to sit in your office and receive excellent non-profit information. Just go to CSEA website to register for the class.

On September 7 the annual CSEA State Liaison meeting takes place in Sacramento. It is an excellent opportunity to met with SBOE, FTB and EDD executives. Hear what is happening, get phone numbers of people to contact if you are having a problem with any of these agencies and tell them your concerns. Get your problems resolved.

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.

New Members

Jonathan Hill EA, Linda Hudson EA
Linda Nebenzahl EA

CALENDAR

July

Wednesday, July 04

Because of the holiday, the Tax Support Group meeting will not be held this month.

Thursday, July 05

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

Tuesday, July 10

9:30 AM - 11:30 AM

Education Committee Meeting
If you are interested in helping plan educational programs for MSEA, please join us.

Telesky Financial Services
2095 Park Ave, San Jose

Wednesday, July 11

11:30 AM - 12:30 PM

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

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

6:00 PM - 9:00 PM

Practice Management SIG at FAZ
The Practice Management SIG will be meeting in the evening beginning July 11. The group will discuss practice management and general tax issues encountered by tax professionals. Everyone is welcome. This month's meeting will be held at:

Faz Restaurant
1108 North Mathilda Avenue
Sunnyvale, CA 94086

If you have any questions, contact Jill Mendenhall (408) 617-0391.

Tuesday, July 17

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: Marc Blakeney of Equitas Capital

Topic: Techniques to maximize client real estate deductions

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, July 24

6:00 PM - 9:00 PM

Palo Alto Dinner Meeting
6:00 PM Registration
6:30PM - 8:00PM
Dinner and Presentation

Speaker: Leonard Williams, CPA EA

Topic: *Common Client Misunderstandings and How to Respond*

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

Wednesday, July 25

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

Saturday, July 28

9:00 AM - 3:30 PM

2007 Preparation Classes for Special Enrollment Exam
Part 1 Individuals

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 PM

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

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
Please 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: 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.

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

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

C A L E N D A R

September *continued*

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: TBA

Topic: TBA

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, 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: 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, September 26

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

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