



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

June 2008 / Volume 4 / Issue 3

Board of Directors

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Vacant

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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.missionneas.org
office@missionneas.org

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President's Communication

Where does the time go?



Yes it seems like April 15th was yesterday. What have I done, still trying to get returns out because everyone wants there stimulus payment. Seems funny the clients that didn't get us the informa-

tion until almost October 15th last year and got thousands in refunds are now rushing to get us the information because of the stimulus payments and they don't even qualify for one.

Ok, enough about my problems. Mission Society is in the running for Chapter of the year. A final vote has been taken and the announcement will be at the CSEA banquet on June 26th. If you are interested in going look at the www.csea.org to sign up.

The society is having a retreat to help determine on what the society wants. You received a notice from us on June 6th and hopefully this newsletter will be out before it happens on June 12th at the Elks lodge in Santa Clara. You can RSVP to me at either randy@4taxman.com or 408-445-1151.

Do you have someone in your office that wants to go from a non tax position to tax preparer? We are putting together a CTEC qualified course that will begin in or around September.

Make sure you enjoy your summer!

Thanks,

Randy Warshawsky, EA
President 2007-2008

Monthly Meetings

San Jose Meeting

3rd Tuesday of the Month at 11:30 AM
Maggiano's Little Italy,
Santana Row, San Jose

Awards:

- EA of the year
- Booster of the year
- Rookie of the year
- Elections
- Installation of Officers
- President's address (The finish Line)

Monterey Meeting

3rd Thursday of the Month at 12:00 Noon
Tarpy's Roadhouse
2999 Monterey Salinas Hwy., Monterey

Speaker: To Be Announced

Topic: To Be Announced

Palo Alto Meeting

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

Speaker: To Be Announced

Topic: To Be Announced

Chapter of the Year

Mission society is in the running for Chapter of the year from CSEA. I believe the last time we were chapter of the year was 1990 when Robert Duitz, EA was President. If you are interested in attending the dinner contact CSEA.

Our Condolences

This tax season we lost Roger Cuadra, a member since 1986, and Elizabeth Tinics's husband, Bill Tinics. Our thoughts are with the families.



Committee Chairs:

Awards

Viola Nisonger, EA

Budget & Finance

Russell Barnett, EA

By Laws

Rosemary Hernandez, EA

Communications /Newsletter

Arnold Pinck, 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 Hadduck, 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.

Board Minutes

San Jose, CA

May 20, 2008

President Randy Warshawsky, EA at 10:00 AM, called Mission Society of Enrolled Agents regular board meeting to order.

Roll call was taken. Following board members were present:

President Randy Warshawsky, EA, Vice President Alan Pinck, EA, Treasurer: Russell Barnett, EA, Secretary Jaswant S. Jessie, EA, Immediate Past President George Pan, EA Directors Arnold Pinck, EA, Dorothy Lang, EA, Iise Beck, EA, Jill Mendenhall, EA, Sam Trinh, EA, Torrie Charvez, EA, CSEA Directors James Houston, EA and Myra Thompson, EA

Visitors: Laura Hadduck, EA, David Hatt, EA and George Vogel, EA

Board Member Absent: Directors: Margie Dunn, EA, Wai Ling Chai, EA

Minutes of the April 22, 2008 MSEA meeting were accepted as presented.

TREASURER'S REPORT: Presented and reviewed.

COMMITTEE AND ORGANIZATION REPORTS: Were presented.

OLD BUSINESS: None

NEW BUSINESS: Motion was presented and passed unanimously that reserve the larger room for June 2008 MSEA lunch meeting.

Motion was presented and passed unanimously that MSEA cancel merchant services account and switch to POS West for our authorize.net merchant account. Cancellation should be carried out in such a way that no cancellation fee is charged.

ADJOURNMENT:

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

The next meeting is scheduled for June 17, 2008 at 10:00 AM at Maggiano's, in San Jose, CA.

Respectfully Submitted,

Jaswant S. Jessie, EA

MSEA, Secretary

Report for CSEA Board and Committee Meetings on May 27-28, 2008

I attended the Board of Directors Meeting from 8:00 am to 9:00 am and the following committee meetings:

Bylaws Committee (Guest) - Bylaws of CSEA, NAEA and Chapters are currently being aligned and inspected (done annually) to insure there are no conflicts or gaps.

Membership and Chapter Development Committee (member) - New Member Orientation efforts have been tabled until next year in order to get a better understanding of what services and benefits members value most. A conference call will be held in order to begin creating a focused survey to answer the benefits and services question(s). Second, CSEA will strive to make each Chapter Membership Chairperson a CSEA Supporting Member on the Membership committee. The idea here is to maintain closer CSEA/Chapter contact for better communications, unity and support. One Chapter raised their membership by about 10% simply by calling and talking to their previous Chapter members. Third, this committee will strive to start recognizing the past outstanding contributions of members and volunteers. Haydon Wisdom was nominated for Honorary Membership at this meeting. (The Board later passed this nomination.)

Political Action Committee (Guest) - Strategies for how to find new funds were discussed. Ideas for possible sources include everything from lotteries for 1-week stays in time-shares (Hawaii seems to be the most favored location) to a new PAC pin every year that would indicate a current donation from those in possession.

PEPCO Committee (Supporting Member) - Exact Super Seminar numbers were not released but the Chairper-

2008 Retreat

June 12th at 9:30
Elks lodge
1680 Martin Ave., Santa Clara CA

We will be discussing making MSEA better in 2008-2009. What is better? We don't know come tell us!

All our invited to come. Your input really helps guide us on what MSEA is. If you are not sure or can only make it for part of the day that is fine. I can only guarantee lunch for the RSVP's.

Please RSVP to Randy either by phone or e-mail so we have enough food for you. Please RSVP as soon as you can.

CPE on CSEA Website

Do you know that CSEA tracks your CPE?

You can get information for all CPE that you get from CSEA or any chapter of CSEA including MSEA. Below is how to get it from the CSEA website:

You can access you CPE units on the website. Once you login click on the Members Area and on the drop down menu click on preferences it will then ask you to login again then you can click on my information and there you will find that you can get your CPE hours along with other information.

CSEA Report - Continued from page 2

son reported that they were very well attended this year. But sponsor and booth attendance was noticeably down from last year. And for an unknown reason Lacerte did not attend any of our Super Seminars this year. Second, CSEA is working on making all member CSEA CPE credits available for downloading from the website after logging in. CPE website downloads are apparently available now but according to Cathy Apker the process is very convoluted so they are currently faxing the information upon request.

Finance and Budget Committee (member)
– The 2008-2009 budget was introduced, recommended to and adopted by the Board and includes Total Revenue of \$1,784,230, Total Ex-

PAC Pack your Bags for Maui

CSEA Political Action Committee is holding a raffle for one week in a beautiful condo in Maui, Hawaii. The winner will enjoy one week in a two-bedroom condo that sleeps 6 and is approximately 1100 sq ft in the Maui Lea Resort. Maui Lea at Maui Hill resides directly across the street from some of Maui's most famous beautiful beaches. The spacious condo is a ground floor unit in close proximity to the pool, putting greens, and recreation area. There are ocean views from all over the Maui Lea Resort property. For more information, visit their website at <http://www.mauilea.com/>. Estimated value of the deluxe prize is \$1,500.

Tickets cost 1 for \$10.00 or 3 for \$25.00. Cash or Checks made out to CSEA PAC Only. The drawing will be held June 26, 2008 but tickets need to be purchased before June 20, 2008. Winner need not be present to win.

Contact Myra Thompson, EA at (408)723-2402 or (408)765-4644, email address enrolled2@yahoo.com to purchase tickets.

penses of \$1,831,625 and results in a Change in Net Assets Cash Flow of (\$47,395). This deficit budget will be covered by CSEA's ample cash reserves. Second, the new chairperson this year will be Don Stacy, EA and an ex-controller who seems capable and is receptive to ideas and suggestions for finding solutions to our Finance reporting problems. Third, problems continue with the CSEA finance reporting software since it does not have the capability of printing cash flow reports or exporting finance reports to a .csv or any other spreadsheet type file.

Submitted June 03, 2008
James Houston, EA
408.446.4433

The Mission Society in Conjunction with ClientWhys Presents the 1040 Review & Update Seminar

**November 17 & 18, 2008
at the Wyndham Hotel**

This two-day (16 hours CPE) presentation will include the following:

- New Law Changes
- Significant New Rulings
- Solutions to Troublesome Issues
- Tax Strategies
- California Differences

Registration Information:

Register by 8/31 - \$298.00
 Register between 9/1 and 10/18 - \$318.00
 Register after 10/18 - \$338.00

Why is Our Seminar the Best Value in CPE?

Your Chapter Also Benefits - In a revenue sharing agreement with your chapter, a portion of your seminar registration fee goes to your chapter to fund your chapter's other activities.

Award-Winning Text – Our attendees tell us that our text is the best they have ever seen. Probably because our text has evolved over almost 30 years, and it has been updated to the point that many use it as their primary reference source throughout the year. Last year's text included over 900 pages of valuable information.

Bonus CPE Credits – Knowing that many of our students need more than just 16 hours of CPE, we include an 8-hr correspondence course that relates to the portion of the text not covered during the live presentation. This extra course is free to our students when they take the final exam online.

Text on a CD – We provide a CD containing the entire seminar text in a searchable PDF format with each chapter linked to the table of contents. This provides our students with a free and excellent stand-alone tax research system.

For more information or to register, see form on page 8 of this newsletter.

60 Hour Course Offered

MSEA is in the planning stages of offering a 60 hour course that would qualify the students in obtaining a CTEC certificate. If you know of someone trying to get into this field this would be a great start. We are looking at the locations and dates for this class it will probably start in or around September. You can contact our President by e-mail for further information. randy@4taxman.com

Upcoming Events

Town Hall Meeting:

Just announced the date and location of the Town Hall meeting for 2008. Wednesday Sept. 24th at the Clarion Hotel, SF Airport in Milbrae.

Mini Seminars:

The education committee has a "short list" of education topics for the Mini's this year. Watch the newsletter for updates.

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

May Anniversaries

5/2/1977	Sharon Kreider EA CPA
5/31/1977	Sally Sepulveda EA CFP
5/31/1977	Leonard Williams EA CPA
5/31/1984	Hildegard Finta EA
5/14/1985	Beverly Haughton EA
5/22/1985	Weldon Wilson EA
5/3/1986	Jane Massie EA CFP
5/3/1986	Cathy Stahler EA Esq
5/19/1986	Ronald Sekkel EA
5/29/1986	Melvin Cutler EA
5/13/1987	Larry Snyder EA
5/14/1987	Norma Foss EA
5/23/1987	Susanne Mallory EA
5/20/1988	Erich Haessler EA
5/4/1991	Jane E. Klaus EA
5/5/1994	Randi McMasters EA
5/8/1995	William Oakes EA CFP
5/15/1995	Andrew Andrikopoulos EA
5/18/1995	Alice Dishon EA
5/15/1997	Julito Veja EA
5/12/1998	Alan Pinck EA
5/12/1998	Wanda Wilson EA
5/28/1998	Johan Van De Polder EA
5/10/1999	John Mathias EA
5/21/1999	Perviz Guard EA
5/21/1999	Jaswant Singh EA
5/2/2000	Kenneth Rewinkel EA
5/3/2001	James Price EA
5/16/2001	Colin Ford EA
5/21/2001	John Song EA
5/1/2002	Gilberte Tacheny EA
5/14/2002	Karen DeHart EA
5/5/2004	Tom Chun EA CFP
5/12/2004	Susan Dodd EA
5/17/2004	Fred Kattuah EA
5/2/2005	Thelma Cohen EA
5/19/2006	Laura Haddock EA
5/30/2006	Vinh Cao EA

Welcome New Members!

Vanessa Anderson EA	San Jose	1/7/08
John Webster EA	Del Rey Oaks	1/14/08
Stephen Ginsky EA	Del Rey Oaks	1/23/08
Mike Novielli	San Jose	2/6/08
Diep Trinh EA	San Jose	2/25/08
Almon Babbitt CPA	Carmel	2/25/08
Patricia Chavez	Santa Clara	3/5/08
Mark Shir EA	Fremont	3/5/08
David Vieira	San Jose	3/10/08
Terri Goddard EA	Campbell	3/17/08
Kimberly Burkett	Morgan Hill	3/18/08

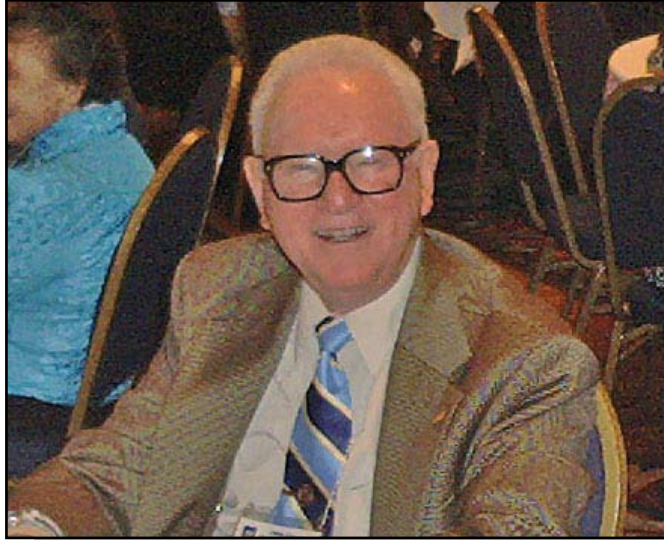
June Anniversaries

6/2/1977	Renate Howells EA
6/8/1983	Patricia DuNah EA
6/8/1983	Audrey Orlando EA CFP
6/23/1983	Norman Jenks EA
6/27/1985	Charles Pillers EA
6/5/1986	OswaldoDiaz-Christians EA
6/20/1986	William Downey EA
6/12/1989	Jeanette Telesky EA
6/28/1989	Carl Middione EA MBA
5/1/1990	Kenneth Petersen EA CFP
6/4/1990	Dung Nguyen EA
6/19/1990	Wasil Petros EA
6/30/1990	Tram Pham EA
6/8/1992	Annie Le Nguyen EA
6/16/1993	Ingermarie Bevans EA
6/22/1993	Subhash Desai EA CFP
6/9/1994	Harris Willner EA
6/30/1994	Kathleen Crispino EA
6/30/1994	Karen Fihn EA
6/6/1995	David Balog EA
5/8/1996	Robert Hearn EA
6/24/1996	George Pan EA
6/4/1997	Ken Huang EA CPA
6/1/1998	LouJean Vannatta EA
6/3/1999	Chi Nguyen EA
6/13/1999	Lena Diethelm EA
6/14/1999	Kent Noard EA CFP
6/16/1999	Myra Thompson EA
6/22/1999	Robert Mirolo EA
6/30/1999	Cynthia Leachmoore EA
6/20/2000	Fernanda Amaral EA CPA
6/20/2000	Jennifer Logan EA
6/20/2000	Nancy Pyzel EA
6/25/2002	Joel Berk EA
6/23/2003	Brenda George EA
6/9/2004	Allison Redington EA
6/14/2004	Mona Dawn Edwards EA
6/17/2004	Nga Nguyen EA
6/2/2005	Julie Brown EA
6/2/2005	Eva Hartzell
6/3/2005	Patrick Young EA
6/6/2005	Volha Shpilevskaya EA
6/6/2006	Luis Berrios EA
6/8/2006	Wai Ling Chai EA
6/14/2006	Bennet Perera EA
6/1/2007	Jonathan Hill EA
6/1/2007	Linda Hudson EA
6/20/2007	Linda Nebenzahl EA
6/25/2007	Stanley Matsuo EA

Getting to Know You...

If you would like to suggest or recommend a member for the monthly member profile, please contact Jill Mendenhall at mendenhalltaxes@gmail.com.

Leonard (Len) Schlüssel



Shortly after starting college in 1943 Len was called to active duty and served 27 months in the army, including combat, in Southern France (earning 2 purple hearts). Upon his return he continued his college education at University of California as a Business major specializing in accounting. After graduating, Len became a Public Accountant and earned a Secondary Teaching Credential in business at San Francisco State College. He began a part-time bookkeeping

practice while initially working full-time for a Public Accountant then as a teacher at James Lick High School. It was not long before he began preparing taxes too.

Len retired from teaching in 1987. It was while taking some continuing education classes for his PA license that he learned of the EA exam, enrolled in a Thompson class, passed the exam, and joined MSEA. Len became an enrolled agent in 1988.

When not working on individual and trust returns, Len enjoys stamp collecting, reading and western-style target shooting. He joined the organization for networking and support. Over the years he has gained knowledge, received assistance when needed and made friends at MSEA. Fortunately for MSEA, Len also finds time to volunteer. He is a member of the education committee who has chaired the Cast-in-Concrete seminars for the last 14 years.

**Help Wanted:
EA READY TO HELP DURING
AND AFTER TAX SEASON 2007**

with 4 years experience in Taxes and 10 years experience in Bookkeeping/Payroll. Lacerte and Quickbooks. Full or part time in Santa Cruz/Watsonville area. Email: patriaciab-ea@sbcglobal.net

phone: 831-234-1164



APRIL 15

Year Round

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

**** Available Now ****

Pluses:

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



The Tax Man

1800 Hamilton Av #220 Located between Meridian and Leigh Av.

E-mail resumes with salary requirement to HRAdmin@4taxman.com

C A L L E N D A R

June

Tuesday, June 3

11:30 AM – 12:30 PM
General Tax & Practice Mgmt SIG
Holder's Country Inn
998 S. De Anza Blvd., San Jose
Contact: Sonya Meissner EA at:
(408) 257-9134
E-mail: sonya_meissner@yahoo.com
RSVP requested

Wednesday, June 4

11:45 AM – 12:45 PM
Tax Support Group
Effie's
331 W. Hacienda Ave, Campbell
Contact: Martin Lowe at (408) 879-9469
E-mail: martin@martinlowecpa.com
RSVP requested

Thursday, June 5

12:00 PM – 1:00 PM
Tax Support Group (Everything but
1040s)
Telesky Financial Services
2095 Park Ave, San Jose
Contact: Jan Telesky at (408)-551-6580
E-mail: jdtele@aol.com
RSVP requested

Thursday, June 12

9:30 AM
Mission Society Retreat
Elks Lodge
1680 Martin Av
Santa Clara
Come help lead MSEA into the future.
RSVP to Randy@4taxman.com or 408-
445-1151

11:30 AM – 12:30 PM

Tax Support Group
Bakers Square
5055 Almaden Expressway, San Jose
Contact: Beverly Haughton at
(408) 356-4832
RSVP requested to:
khaughton@juno.com

Tuesday, June 17

10:00 AM - 11:45 AM
San Jose Board Meeting
11:45 AM - 1:30 PM
George has supplied info

Tuesday, June 24

6:00 PM - 8:00 PM
Palo Alto Dinner Meeting
6:00 PM Registration
6:30 PM - 8:00 PM Dinner and Presen-
tation
Speaker: TBA
Topic: TBA
Dinner Fee: \$30 in advance or \$35 at
the door.
RSVP: E-vite or contact MSEA office at
800-832-6732

July

Tuesday, July 1

11:30 AM – 12:30 PM
General Tax & Practice Mgmt SIG
Holder's Country Inn
998 S. De Anza Blvd., San Jose
Contact: Sonya Meissner EA at
(408) 257-9134
E-mail: sonya_meissner@yahoo.com
RSVP requested

Wednesday, July 2

11:45 AM – 12:45 PM
Tax Support Group
Effie's
331 W. Hacienda Ave, Campbell
Contact: Martin Lowe at (408) 879-9469
E-mail: martin@martinlowecpa.com
RSVP requested

Thursday, July 3

12:00 PM – 1:00 PM
Tax Support Group (Everything but
1040s)
Telesky Financial Services
2095 Park Ave, San Jose
Contact: Jan Telesky at (408)-551-6580
E-mail: jdtele@aol.com
RSVP requested

Thursday, July 10

11:30 AM – 12:30 PM
Tax Support Group
Bakers Square
5055 Almaden Expressway, San Jose
Contact: Beverly Haughton at
(408) 356-4832
RSVP requested to: khaughton@juno.com

Tuesday, July 15

10:00 AM - 11:45 AM
San Jose Board Meeting
11:45 AM - 1:30 PM
George has supplied info

Tuesday, July 22

No Palo Alto Dinner Meeting This Month

August

Tuesday, August 5

11:30 AM – 12:30 PM
General Tax & Practice Mgmt SIG
Holder's Country Inn
998 S. De Anza Blvd., San Jose
Contact: Sonya Meissner EA at
(408) 257-9134
E-mail: sonya_meissner@yahoo.com
RSVP requested

Wednesday, August 6

11:45 AM – 12:45 PM
Tax Support Group
Effie's
331 W. Hacienda Ave, Campbell
Contact: Martin Lowe at (408) 879-9469
E-mail: martin@martinlowecpa.com
RSVP requested

Thursday, August 7

12:00 PM – 1:00 PM
Tax Support Group (Everything but
1040s)
Telesky Financial Services
2095 Park Ave, San Jose
Contact: Jan Telesky at (408)-551-6580
E-mail: jdtele@aol.com
RSVP requested

Thursday, August 14

11:30 AM – 12:30 PM
Tax Support Group
Bakers Square
5055 Almaden Expressway, San Jose
Contact: Beverly Haughton at
(408) 356-4832
RSVP requested to: khaughton@juno.com

Tuesday, August 19

10:00 AM - 11:45 AM
San Jose Board Meeting
11:45 AM - 1:30 PM
George has supplied info

Tuesday, August 26

6:00 PM - 8:00 PM
Palo Alto Dinner Meeting
6:00 PM Registration
6:30 PM - 8:00 PM Dinner and
Presentation
Speaker: TBA
Topic: TBA
Dinner Fee: \$30 in advance or \$35 at
the door. RSVP: E-vite or contact MSEA
office at 800-832-6732

**The Mission Society in conjunction with ClientWhys
presents the 1040 Review & Update Seminar**

**November 17 and 18, 2008 at the Wyndham Hotel
This two-day (16 hours CPE) presentation will include the following:**

New Law Changes – The seminar will cover all new tax law changes in detail, including those newly-passed and those just taking effect from prior legislation. You will come away with everything you need to prepare returns for 2008 and help your clients' plan for 2009 and future years.

Significant New Rulings – All significant new Revenue Rulings, Tax Court Cases, Revenue Procedures, Letter Rulings, etc., are accumulated and included in the seminar text.

Solutions to Troublesome Issues – We identify the issues and situations most encountered by students, practitioners and other professionals throughout the year and address these problem areas in our seminar. In addition, we try to anticipate tax issues that will be created by new laws, rulings and the ever-changing economic climate.

Tax Strategies – We look for strategies that will help minimize the tax burden of your clients. Topics that are covered include: tax reduction, retirement, education, AMT avoidance and many more. After all, that's what it's all about!

California Differences – California differences are integrated with the Federal tax presentation. After each Federal issue in the text, the CA position on that issue is discussed. It can simply be the "same as Federal" or a detailed explanation of the differences is provided.

Registration Information:

Register by 8/31 - \$298.00

Register between 9/1 and 10/18 - \$318.00

Register after 10/18 - \$338.00

Why is Our Seminar the Best Value in CPE?

Your Chapter Also Benefits – In a revenue sharing agreement with your chapter, a portion of your seminar registration fee goes to your chapter to fund your chapter's other activities.

Award-Winning Text – Our attendees tell us that our text is the best they have ever seen. Probably because our text has evolved over almost 30 years, and it has been updated to the point that many use it as their primary reference source throughout the year. Last year's text included over 900 pages of valuable information.

Bonus CPE Credits – Knowing that many of our students need more than just 16 hours of CPE, we include an 8-hr correspondence course that relates to the portion of the text not covered during the live presentation. This extra course is free to our students when they take the final exam online.

Text on a CD – We provide a CD containing the entire seminar text in a searchable PDF format with each chapter linked to the table of contents. This provides our students with a free and excellent stand-alone tax research system.

No prerequisites or advance preparation required.
Classes are scheduled from 8:00 a.m. - 4:30 p.m., with a 1-hour lunch break. Seminar text, handouts, badges and other materials will be available to pick up at 7:30 a.m.

Refund Policy: Refunds will be granted only if requested at least ten days before the seminar begins; 10% of fee will be withheld from all refunds. We will be happy to transfer your registration to another location, space permitting, if you request the change at least ten days prior to the seminar date. There is a \$15 transfer fee. Cancellations within 10 days of the seminar date can only be credited to your account for a future seminar date. No exceptions. Sorry, no tape recording permitted. For more information regarding administrative policies such as complaint and refund, please contact our offices at (800) 442-2477 Ext. 1.

ATTENDEE NAME: _____

ADDRESS: _____

CITY/STATE/ZIP: _____

PHONE: _____ **FAX:** _____ **EMAIL:** _____

MAKE CHECK PAYABLE TO: ClientWhys, Inc., PO Box 6768, Malibu, CA 90264

Enclosed is my: Check Visa MasterCard American Express Discover

Card # _____ **Exp. Date** _____

Cardholder's Name _____ **Signature** _____

– Please mail the completed order form to ClientWhys, Inc., PO Box 6768, Malibu, CA 90264 –
Faxed order forms can be sent to 818.743.0550 or order online at www.clientwhyscpe.com