



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

May 2006 / Volume 2 / Issue 1

Board of Directors

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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.

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Campbell, CA 95008
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Fax: (408) 371-8677
www.missioneas.org
office@missioneas.org

President's Communication

Don't miss the May meeting. It's time to elect the 2006-2007 board. We are also going to have Raymond M. Sheffield L.L.M speak on estate and trust planning. If you haven't heard him before, he is a great speaker.

Please make your reservation by Thursday May 11th. We have to know you are coming. Last meeting some members were surprised to find out they almost didn't have a seat. We had to make those without a reservation wait until we were able to squeeze them in. And squeeze was the word. We had 11 people sitting at a table when 10 is considered the maximum and eight is really comfortable seating. So if you want to make sure you have a seat and are not turned away at the door, please call in your reservation.

Education co-hosted the e-file seminar with IRS and Franchise Tax Board on Wednesday May 3rd. This event was not even on the planning board before tax season. The IRS called our education chairman, George Vogel, during tax season and ask if we would co-host the event. George contacted the education committee for an email vote and when the committee said yes, George sprung into action. I would like to congratulate George, and his committee for doing such a great job. Especially during tax season when all of us are just trying to keep our head above water.

On April 27th, Tom Chun , PIA Chairman, George Pan, 1st VP, and myself spoke to the members of the Alpha Beta Psi, the accounting fraternity at San Jose State. We had a great time informing them about the EA profession.

On April 26, we had a PLM (formerly called Practitioner Panel) meeting with the IRS. We had a great discussion covering a variety of topics. We also had many key IRS personal in attendance. Our communication channels with the IRS are reopening. Our next PLM meeting will be in August.

May 31st is CSEA the annual meeting in Reno. I hope to see many of you there. On May 29th and 30th the CSEA board and committee meetings will take place. If you haven't attend before, come to Reno and see what the state organization does on your behalf. You can even spend the week and end with super seminars .

June will be my last meeting as President and the installation of the new officers and board.

Hope to see you all at the May meeting.

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

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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

April 26, 2006

The Mission Society of Enrolled Agents regular Board Meeting was called to order by President Karen Fihn, EA at 10:15AM.

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, Dorothy McGinley, EA, Tom Chun, EA, Jessie Singh, EA, Margy Dunn, EA and James Houston, EA. Board members absent: Second Vice President Randy Warshawsky, EA, CSEA Director Mandy Bamdad, EA, Immediate Past President Andrew Bonfield, EA, and Director Ilse Beck, EA. Guest: George Vogel, EA.

Minutes of the last meeting were accepted as corrected.

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 the luncheon fee will be \$25.00 beginning in July 2006 and \$30.00 for non-reservation.

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 May 16, 2006 at 10:00AM at Maggiano's, in San Jose.

Respectfully Submitted,
Ted Danen, EA, Secretary

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.



Year Round

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

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.

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

WHAT'S UP

In The News

EA of the Year

We will be announcing the Enrolled Agent of the year, Rookie of the year and Booster of the year at our June meeting. We usually need nomination by May 1st but have extended that to May 11th since we didn't have an April newsletter. You can find the nomination form at our web site under awards.

New Members:

All new member names have not yet been released to us. We welcome all new members and watch for your name here in the next issue of our newsletter.

Thank You From Equitas Capital

On behalf of Equitas Capital, Rick Caylor, Marc LeGette and Ron Ricard would like to thank the Mission Society of Enrolled Agents for the opportunity to present at your luncheon on April 25th.

Equitas Capital would like to extend an invitation for you to attend our latest mini workshop. This workshop is part of a workshop series designed to provide in-depth information on the real estate market and trends. Our next workshop will cover the following topics:

- 1) Leading economic indicators that affect the housing market
- 2) Real estate trends in appreciation, pricing levels, and housing starts
- 3) Interest rate trends and what affects them
- 4) How this information can be of value to your clients and assist you in differentiating yourself from your competition

Date: May 23rd

Time: 12:00 until 1:30 pm

Location: North American Title Company,
2110 Bascom Ave,
Campbell, CA 95008
(just South from the Pruneyard)

Lunch: will be provided

Cost: free of charge

New Board Nominations

President:

George Pan, EA

President Elect:

Randy Warshawsky, EA

2nd VP:

Mandy Bamdad, EA

Treasurer:

James Houston, EA

Secretary:

Ted Danen, EA

Two Year Term Directors:

Alan Pinck, EA

Myra Thompson, EA

Jessie Singh, EA

Ilsa Beck, EA

Contining Directors (fulfilling their
2nd year of a two year term)

Margy Dunn, EA

Dorothy McGinley, EA

Rosemary Hernandez, EA

CSEA Directors (1 year term):

Karen Fihn, EA

David Hatt, EA

Immediate Past President:

Karen Fihn, EA

Congratulations to all the nominees.

David Hatt

Chair, Nominating Committee

Educational Events

Watch the website for education events. We have a lot in store for you and will have them up there as soon as all the details are available.

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

C A L E N D A R

May

Wednesday - May 03

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 - May 04

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 - May 10

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

Tuesday - May 16

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
Magiano's Little Italy in San Jose

Election of 2006-2007 MSEA board
Speaker: Raymond Sheffield, Attorney
Topic: Many of you have been to his boot camps on estates and trusts. He will be presenting approximately 40 minute talk regarding an "Introduction to Advanced Estate Planning".

Please sign up by Thursday, May 11th, so that adequate seating and food is available.

We came close to not being able to seat signups at the door at our April meeting due to members who did not RSVP. Please RSVP to guarantee yourself a seat, we like to see you at the meeting.

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 - May 24

6:30 PM - 8:30 PM
Monterey Satellite Meeting
Luganos Swiss Bistro in Carmel
Speaker To Be Announced

Please RSVP to Andy Bonfield at 831-625-7681

June

Thursday - June 01

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 - June 07

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

Wednesday - June 14

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

Tuesday - June 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
Magiano's Little Italy in San Jose

Installation of 2006-2007 MSEA board.

Award to be given for EA of the year, Rookie of the year, Booster of the year, and President awards.

Remember all past presidents of MSEA lunch is on MSEA as long as you RSVP.

P.S. Karen don't forget the sock.....

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 - June 28

6:30 PM - 8:30 PM
Monterey Satellite Meeting
Luganos Swiss Bistro in Carmel
Speaker To Be Announced

Please RSVP to Andy Bonfield at 831-625-7681

July

Wednesday - July 05

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 - July 06, 2006

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

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
Magiano'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-MSES (6732)

Wednesday - July 26

6:30 PM - 8:30 PM
Monterey Satellite Meeting
Luganos Swiss Bistro in Carmel
Speaker To Be Announced
Please RSVP to Andy Bonfield at 831-625-7681