



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

November 2005 / Volume 1 / Issue 4

Board of Directors

President

Karen L. Fihn, EA

1st Vice President

George Pan, EA

2nd Vice President

Randy Warshawsky, EA

Treasurer

Rick Hillsbery, 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.

1475 S Bascom Ave. #206
Campbell, CA 95008
Phone: (800) 832-6732
Fax: (408) 371-8677
www.missioneas.org
office@missioneas.org

President's Communication

We welcome the members of the Palo Alto satellite, who have decided to join with us at our meetings.

Do you know someone that has been a Mission member for at least 10 years and deserves to receive the lifetime achievement award this December? If so, please take a moment and fax your nomination to the office. The board will select the winner at the November 15th meeting.

If you are interested in continuing to receive the monthly postcards please e-mail to: editor @missioneas.org and let us know.

George Vogel has another great program planned for the November 15 meeting. We will have two representatives from the Santa Clara County Tax Assessors office. George is also looking for auction items for our December meeting. E-mail him at: vogelbkk@sprynet.com if you have something for the auction.

If you are interested in serving on the MSEA board please contact David Hatt. David is head of the nominating committee this year and his committee hopes to have the slate set before tax season.

Thank you to the education committee for a great seminar on October 27.

I'm looking forward to seeing everyone at the November meeting.

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

Monthly Meetings

San Jose Meeting

3rd Tuesday of the Month
11:30 AM

Maggiano's Little Italy, Santana Row
3055 Olin Ave. #100, San Jose

Speaker: Larry Stone Santa Clara County Assessor since 1994, accompanied by Mark Buckley Chief of the Business Division.

Topic: 571L Personal Business Property Statement. Bring your questions. 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

Monterey Meeting

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

Speaker: Keith Kerschner, IRS Stakeholders Liaison

Topic: Updates to E Filing requirements for 2005 returns and also a general discussion on all the questions you would like to fire at the IRS. Please RSVP to Bill Westphal, EA 831-624-6200 or bill@twjohnston.com

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Committee Chairs:

Audit

Jessie Singh, EA

Awards

Viola Nosinger, EA

Budget & Finance

Rick Hillsbery, 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

October 18, 2005

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

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 Rick Hillsbery, EA, CSEA Director Myra J. Thompson, EA, Directors Ilse Beck, EA, Rosemary Hernandez, EA, Tom Chun, EA, James Houston, EA, Jessie Singh, EA and Margy Dunn, EA.

Board members Absent:

Immediate Past President Andrew Bonfield, EA, CSEA Director Mandy Bamdad, EA and Director Dorothy McGinley, EA.

Visitors: George Vogel, EA and John Oliver, EA.

Minutes of the meeting were approved as presented.

TREASURER'S REPORT:

Was presented.

COMMITTEE AND ORGANIZATION REPORTS:

Were presented.

OLD BUSINESS:

No motions were made.

NEW BUSINESS:

No motions were made.

ADJOURNMENT:

There being no further business, the board meeting was adjourned at 11:20 AM by President Karen Fihn, EA.

The next meeting is scheduled for November 15, 2005 at 10:00 AM at Maggiano's, in San Jose.

Respectfully Submitted,
Ted Danen, EA, Secretary

Educational Events

TaxSmart 1040 Review and Update Seminar

Mission Society and TaxSmart presents the 1040 Review and Update Seminar

When: Thursday & Friday
November 10 & 11, 2005
8:00 am - 5:00 PM

Where: Crowne Plaza Hotel 282
Almaden Blvd., San Jose

2006 Cast-In-Concrete Seminar

California Update

Vicki L Mulak, EA, CFP

Morning Session:

8:30 am - 12:10 PM

2005 Tax Legislation

Conformity/Nonconformity

Credits, Non-Residents, BOE, EDD

Federal Update

Claudia Hill, EA, MBA

Afternoon Session:

1:10 PM - 4:50 PM

2005 Tax Legislation

A Forms Based Approach

When:

Monday, January 9th in Monterey

Tuesday, January 10th in Sunnyvale

Where:

In Monterey:

Embassy Suites

Seaside, 1441 Canyon Del Rey

(For further info contact Andrew Bonfield at 831-625-7681)

In Sunnyvale:

Radisson Inn

1085 East El Camino Real

Details and registration can be found on page 6 of this newsletter. For further info contact MSEA Office at 1-800-832-6272.

WHAT'S UP

In The News

Local Legislator Day

CSEA's 1st Local Legislative Day

SpEAK Tax and Have Your Voice HEARD!

CSEA needs every Member (that means YOU) to get involved in Local Legislative Day. During December CSEA is activating its grassroots program and the goal is to make sure every State Legislator is visited at their local district office by at least one Enrolled Agent. Don't let our Chapter be the reason this goal is not achieved.

Here is what we need YOU to do...

1. If you don't know who your legislators are, find out by checking <http://www.sen.ca.gov/~newsen/senators/senators.htm> and select "Your Senator" or contact CSEA at 800/777-2732. Remember your representatives are based on your home address, not your office. (This website will provide you with both your Senator and Assemblymember(s).)
2. Contact your Chapter Legislative Chair, Mandy Bamdad, EA, at 408-323-0104 or MPB424@AOL.COM and let her know that you are interested in participating and which legislator(s) you can visit. Or you can contact Bronwyn Hughes at CSEA at 800/777-2732 or bhughes@csea.org.
3. CSEA will provide interested Members with all the materials you need to schedule and make your visits.
4. Make the visit(s). You can make your visit(s) individually or in a group.
5. Follow up with CSEA and let them know who you visited. The follow up is critical so CSEA can track which legislators are visited.

Please do your part to make sure all 120 California Legislators know who Enrolled Agents are. If you have any questions please contact Mandy Bamdad, EA (Chapter Legislative Chair) at MPB424@AOL.COM, or Bronwyn Hughes at CSEA at 800/777-2732.

We need participation from as many Members as possible to make this successful. Please do your part to help spread the word on Enrolled Agents. *(At the end of the newsletter you will see a sheet listing our legislators and their district.)*

Lifetime Achievement Award

This award will be given at our December meeting. Nominations need to be to the MSEA office prior to the November board meeting. You can find a nomination form under Awards on the website.

Palo Alto, Morgan Hill, and Gilroy

I have had members mention that they would like to see us have a breakfast or lunch meeting in these areas. I am talking about Special Interest Groups (SIG). We have a number of SIG groups that are already in existence but they are all in the San Jose area. If you are interested e-mail James Houston, EA at jameshoustonea@yahoo.com and he will help you get a group started.

New Members

We want to welcome the following new members to Mission Society of Enrolled Agents:

- Victoria Charvez, EA
- Ben La, EA
- James Wells, EA

Attention: Future Enrolled Agents

If you took the EA test this year you will find a worksheet under our newsletter page to help you determine your score with the proposed answers. This worksheet was prepared by James Houston, EA.

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

WHAT'S UP

In The News *(continued)*

Enrolled Agents Continuing Professional Education (CPE) Audit *(From IRS.gov Site)*

The Office of Professional Responsibility (OPR) is in the process of sending CPE Audit letters to approximately 300 Enrolled Agents with social security numbers ending in 0, 1, 2 or 3.

In order to qualify for renewal of enrollment, an individual enrolled to practice before the Internal Revenue Service must certify, on the application for renewal form that he or she has satisfied the continuing professional education requirements as described in Section 10.6(e) of Treasury Circular 230. Random audits are conducted to ensure compliance with these important requirements. Non-compliance may be grounds for disciplinary action. Section 10.6(i) requires that individuals applying for renewal must retain for a period of three years following the date of renewal of enrollment the documentation showing evidence of completion of courses taken.

OPR is requesting the necessary documentation to validate the number of CPE hours claimed on Form 8554, Application for Renewal of Enrollment to Practice Before the Internal Revenue Service.

This is for real. Here's a first-hand account from an East Bay Chapter member:

"I was one of the lucky souls who got my hours audited by the IRS. I was in a state of panic because for the very first time in 27 years, I was short hours and had to use made up hours in this fiscal year to meet the requirement. (My firm has gotten a little silly with my CPE hours because none of our in-house training applies to me unlike the CPA's) Along with that, I had been told by the IRS last year that it was conceivable that if the education requirements were strictly interpreted, my CA tax law classes wouldn't count.

Well, good news. I received a letter yesterday thanking me for taking my continuing-ed requirements seriously and then for responding to their request for proof of attendance. Just thought you might want to pass it on."

So, keep your continuing education records in order. You could be next!

Postcards To Be Discontinued

Please respond to the editor if you find that the discontinuation of the postcard would effect you. Send your reply to: editor@missioneas.org

Thank you for your help.

For Sale: Thomas Tax Seminar Home study course (2005) to study for the IRS exam, which also includes the review book. Price: \$100 for 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.



Tax Help Needed

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

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

C A L E N D A R

November

Wednesday, November 2

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

Thursday, November 3

7:45 AM - 9:00 AM
Holders Country Inn
Contact: Marilyn Mac Nab
408-446-4451 or macnab@taxmam.com

11:30 AM - 12:30 PM
Estate and Trust, City Dinner
Contact: Randi Clarke, EA
(408) 973-9300
RSVP requested by e-mail to:
randi_tax@yahoo.com

Monday, November 7

9:30 AM - 11:00 AM
Education Committee meeting at Telesky
Financial - 2095 Park Ave., San Jose

Wednesday, November 9

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

Thursday - November 10

8:00 AM - 5:00 PM
Mission Society and TaxSmart presents
the 1040 Review and Update Seminar
Crowne Plaza Hotel
282 Almaden Blvd., San Jose
See registration form on the website
under Education

Friday, November 11

8:00 AM - 5:00 PM
Mission Society and TaxSmart presents
the 1040 Review and Update Seminar
Crowne Plaza Hotel
282 Almaden Blvd., San Jose
See registration form on the website
under Education

Tuesday, November 15

10:00 AM - 11:30 AM
Board Meeting MSEA

Tuesday, November 15 (continued)

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: Larry Stone
Santa Clara County Assessor since
1994, accompanied by Mark Buckley,
Chief of the Business Division.
Topic: 571L Personal Business Property
Statement. Bring your questions. 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, November 16

10:30 AM - 2:00 PM
Practitioner Panel Meeting to be held at
2095 Park Ave. San Jose
Please RSVP to the MSEA office by
11/14/05 as Lunch is provided for at-
tendees. Office@missioneas.org or 800-
832-MSEA (6732). If you have questions
of the IRS e-mail them in.

6:30 PM - 8:30 PM
Monterey Satellite Meeting
Lugano's Swiss Bistro in Carmel
(Note day change because of Thanksgiving)
Presenter: Keith Kerschner, IRS Stake-
holders Liaison on updates to E Filing
requirements for 2005 returns and also
a general discussion on all the questions
you would like to fire at the IRS.
Please RSVP to Bill Westphal, EA
831-624-6200 or bill@twjohnston.com

December

Thursday - December 1

7:45 AM - 9:00 AM
Holders Country Inn
Contact: Marilyn MacNab 408-446-4451
or macnab@taxmam.com

11:30 AM - 12:30 PM
Estate and Trust, City Dinner
Contact: Randi Clarke EA 408-973-9300
RSVP requested by e-mail to:
randi_tax@yahoo.com

Wednesday - December 7

10:00 AM - 11:30 AM
VITA instructors meeting

Wednesday - December 7 (continued)

The meeting will be held at the IRS office
located at 55 S. Market St., 4th floor,
Room 411, San Jose.
Contact Randy at 408-445-1151 or
Randy@4taxman.com for additional info

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

Wednesday - December 14

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

Thursday - December 15

6:30 PM - 8:30 PM
Monterey Satellite Meeting
Lugano's Swiss Bistro in Carmel
(Note day change because of Christmas)

Presenter is Jon Pariser, Investment
Representative with Linsco Private
Ledger.

Answers to the many questions our
clients ask us about taxable conse-
quences of income from many different
types of investments including annuities.
Jon has an exceedingly developed sense
of humor and I think you will enjoy him,
especially at this holiday time of the year.

Please RSVP to Bill Westphal, EA
831-624-6200 or bill@twjohnston.com

Tuesday - December 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
Maggiano's Little Italy in San Jose

Speaker: None - Annual Holiday party
with excellent lunch, music, and auction.
The committee is asking for donations
of items for the auction. If you have an
item you wish to donate, please contact
George Vogel at vogelbkk@sprynet.com

Topic: Annual Holiday Party

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

MISSION SOCIETY OF ENROLLED AGENTS

2006 Cast-In-Concrete Seminar

Monday, January 9th in Monterey

Tuesday, January 10th in Sunnyvale

California Update

Federal Update

Vicki L Mulak, EA, CFP

Morning Session

8:30 am - 12:10 pm

2005 Tax Legislation

Conformity/Nonconformity

Credits, Non-Residents, BOE, EDD

Vicki Mulak regularly speaks to Chapters of CSEA and CA Society of Tax Consultants on California tax law and other tax related topics. She was a featured speaker at NAEA's NTEI 2003 and the 2003 CSEA Super Seminar.

She owns American Financial and Tax in Tustin and has taught Special Enrollment Exam classes for the Orange County Chapter of CSEA for the last twelve years.

She represents the California Society of Tax Consultants on EDD's Small Business Employer's Advisory Committee.

Vicki appeared on the IRS' web cast "Tax Talk Today" in December, 2004.

In 1996 she received the U.S. Small Business Administration's "Accountant Advocate of the Year" Award for her excellent support of the local business community.

Claudia Hill, EA, MBA

Afternoon Session

1:10 pm - 4:50 pm

2005 Tax Legislation

A Forms Based Approach

Claudia Hill is a nationally recognized tax professional and frequent lecturer on taxation of individuals and representation before the IRS. She is Editor in Chief of the CCH, Inc. "Journal of Tax Practice & Procedure" and a Contributing Author to Thomson-PPC's "Guide to Dealing with the IRS" and CCH "1040 Express." Ms. Hill has testified before both the Senate Finance Committee and House Ways & Means Committee on tax issues, including tax law complexity and the AMT. She is often called upon by the media for comment about tax issues. In March, 2005 Claudia was invited by the President's Tax Reform panel to present testimony on the individual AMT.

Ms Hill is owner and principal of Tax Mam, Inc., an association of Enrolled Agents in Cupertino, CA.

***In Monterey* Embassy Suites Seaside, 1441 Canyon Del Rey**

(For further info contact Andrew Bonfield at 831-625-7681)

***In Sunnyvale* Radisson Inn, 1085 East El Camino Real**

(For further info contact MSEA Office at 1-800-832-6272)

Registration 8:00 am / 1:00 pm (CPE to 8 Hrs) Includes Continental Breakfast & Lunch (Full-Day price includes lunch)

Cancellation Policy: To qualify for a refund, fax or call at least 48 hours prior to function. No cash refunds will be provided. A credit voucher will be issued good towards any MSEA function within one year of this function.

Name _____

EA PA CPA ATTY CTEC Lic # _____

Address _____

City/State/Zip _____

Phone _____ Fax _____

Vegetarian Nickname for Badge _____

Check Visa MasterCard

Acct # _____ Exp ____/____

Signature _____

Mail to: MSEA, 1475 So. Bascom Ave, Suite 206, Campbell, CA 95008

FAX Charge to: 408-371-8677 or email "office@missioneas.org"

Jan 9 - Monterey Jan 10 - Sunnyvale

Both California Federal

C-I-C EARLY BIRD SPECIALS

POSTMARKED BY DECEMBER 2, 2005

ONE BOTH

CSEA Members/Staff	\$85	\$165
NonMembers	\$90	\$175

C-I-C REGULAR FEES

ONE BOTH

CSEA Members/Staff	\$95	\$180
Non-Members	\$100	\$190

ATTACH MSEA DISCOUNT COUPON

MSEA USE: Date Rcvd

AMT

CHECK

CALIFORNIA STATE SENATE REVENUE AND TAXATION COMMITTEE		Phone #	EA CONTACT	CONTACT INFORMATION FOR REV. & TAXATION
MEMBER NAME	DISTRICT			
Senator Michael Machado (Chair)	5	916-323-4306		Consultants: Martin Helmke & Gayle Miller Assistant: Marisa Lanchester Phone # 916-651-4119 Room 408
Senator Robert Dutton (Vice-Chair)	31	916-651-4031		
Senator Elaine Alquist	13	916-651-4013		
Senator Debra Bowen	28	916-651-4028		
Senator Gilbert Cedillo	22	916-651-4022		
Senator Charles Poochigian	14	916-651-1014		
Senator George Runner	17	916-651-4017		
Senator Jack Scott	21	916-651-4021		
CALIFORNIA STATE SENATE BUSINESS & PROFESSION COMMITTEE		Phone #	EA CONTACT	CONTACT INFORMATION FOR BUSINESS & PRFESSION
MEMBER NAME	DISTRICT			
Senator Liz Figueroa (Chair)	10	916-651-4010		Consultants: Bill Gage, Jay DeFuria, V.Ayers,Doug Brown and Robin Hartley Assistant: Kathy Sullivan, Phone # 916-651-4104, Room 2053
Senator John Campbell (Vice-Chair)	35	916-651-4035		
Senator Samuel Aanestad	4	916-651-4004		
Senator Dean Florez	16	916-651-4016		
Senator Bill Morrow	38	916-651-4038		
Senator Kevin Murray	26	916-651-4026		
Senator Joe Simitian	11	916-445-6747		
CALIFORNIA STATE ASSEMBLY REVENUE & TAXATION COMMITTEE		Phone #	EA CONTACT	
MEMBER NAME	DISTRICT			
John Klehs (Chair)	18	916-319-2018		Phone # 916-319-2098
Mimi Walters (Vice-Chair)	73	916-319-2073		
Joseph Canciamilla	11	916-319-2011		
Judy Chu	49	916-319-2049		
Chuck DeVore	70	916-319-2070		
Dave Jones	9	916-319-2009		
Sally J. Lieber	22	916-319-2022		
CALIFORNIA STATE ASSEMBLY BUSINESS & PROFESSION COMMITTEE		Phone #	EA CONTACT	
MEMBER NAME	DISTRICT			
Gloria Negrete McLeond (Chair)	61	916-319-2061		
Shirley Horton (Vice-Chair)	78	916-319-2078		
Karen Bass	47	916-319-2047		
Dario Frommer	43	916-319-2043		
Paul Koretz	42	916-319-2042		
Bill Maze	34	916-319-2034		
Joe Nation	6	916-319-2006		
Van Tran	68	916-319-2068		
Juan Vargas	79	916-319-2079		
Leland Yee	12	916-319-2012		