



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

November 2006 / Volume 2 / Issue 7

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

Karen Fihn, EA

David Hatt, EA

Directors - Second Year of Two Year Term

Margy Dunn, EA

Dorothy McGinley, EA

John Oliver, EA

Sam Trinh, EA

Directors - First Year of Two Year Term

Ilsa Beck, EA

Alan Pinck, EA

Jessie Singh, EA

Myra Thompson, 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

Welcome back the Palo Alto Satellite Meeting!! The 1st in a while Palo Alto Satellite meeting will be held on October 24, 2006 as a dinner meeting – rather than the previous lunch meetings – at Ming's Restaurant in Palo Alto. Big Thank you to Jill Mendenhall, EA for her help in resurrecting the Palo Alto Satellite Group meetings. If you are interested to attend the monthly meeting in the future, please contact her via her e-mail address at taxprep@mendenhall-taxes.com. Also Jill is the Co-Chair of our Membership Committee, she chaired the Membership Committee meetings while Tom Chun, Chair of membership, was on vacation this past summer. Thanks again Jill for your dedicated contribution.

Congratulations to newly-elected Director Sam Trinh, EA. He joined Mission Chapter in 2002; he has his practice in San Jose. Welcome to the Board, Sam!

If you know someone that has been a Mission member for at least 10 years and deserves to receive the Lifetime Achievement award, please fax your nomination to the office at 408-371-8677. The board will vote at the November meeting, on November 21, 2006.

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

Happy Thanksgiving and enjoy your Thanksgiving dinner!!!

George Pan
President of MSEA
Phone: (408) 727-8011
Email: panpadgett@comcast.net

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

This Month's Speaker: Alan Pinck
Topic: Mortgage Interest Deductibility

Monterey Meeting

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

DATE CHANGE: NOVEMBER 15
This Month's Speaker: James Kinsey
Topic: IRS Update

Palo Alto Meeting

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

This Month's Speaker: To Be Announced
Topic: To Be Announced

INSIDE THIS ISSUE:

Board Minutes 2

In The News 2-3

Education..... 4

Calendar 5-6

Committee Chairs:

Awards

Viola Nosinger, EA

Budget & Finance

James Houston, EA

By Laws

Rosemary Hernandez, EA

Communications

/Newsletter

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

Jill Mendenhall, EA

Monthly Meeting Program

George Vogel, EA

Nominating

David Hatt, EA

Office Liaison

Myra Thompson, EA

Past Presidents

Advisory Council

David Hatt, EA

Public Awareness

& Information

Tom Chun, 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

October 17, 2006

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, Secretary Ted Danen, EA, Treasurer James Houston, EA, Immediate Past President & CSEA Director Karen Fihn, EA, Directors Jessie Singh, EA, Ilse Beck, EA, Alan Pinck, EA, George Vogel, EA, Myra Thompson, EA and John Oliver, EA. Board members absent: Second Vice President Mandy Bamdad, EA, CSEA Director David Hatt, EA and Director Dorothy McGinley, 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:

None

NEW BUSINESS:

A motion was made and approved for Sam Trinh to be an MSEA Director.

A motion was made and approved to accept the CSEA Affiliation Agreement.

ADJOURNMENT:

There being no further business, the board meeting was adjourned at 11:35 AM by President George Pan, EA. The next meeting is scheduled for November 21, 2006 at 10:00 AM at Maggiano's in San Jose.

Respectfully Submitted,

Ted Danen, EA

Secretary

In The News

New Members

Mission Society of Enrolled Agents welcomes new member Feng-Wen Chang, EA.

Quickfinder Books

Sign-ups for Quickfinder books are now available. Contact John Oliver EA at jolivera@AOL.Com. The price is \$38.72 per book. The price is the same for either the individual or the business book. Delivery will be at the January 2007 monthly meeting. This is a savings of \$12.00 if ordered individually.

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.

Thanks, *The Editor*

Palo Alto Meetings are Back!

Palo Alto MSEA Dinner Meeting
Tuesday, November 28th
Ming's Restaurant
1700 Embarcadero Road, Palo Alto
Registration: 6:00 PM
Dinner: 6:30 - 8:00 PM
Speaker: TBA
Topic: TBA
Dinner fee is \$33 in advance and \$38 at the door.
RSVP: MSEA office office@missioneas.org or 1-800-832-6732

In The News

Questions & Answers About Evite

By now I'm sure most of you understand how simple EVITE.com is to use for making reservations for our monthly MSEA luncheons. This article provides suggestions on how to handle some specific (possibly problematic) situations. For example:

Q. HOW DO I CANCEL IF MY PLANS CHANGE AND I'VE ALREADY MADE A RESERVATION?

A. Easy. Just use the same email invitation you received, and used to reserve your luncheon, to cancel your reservation. Open your invitation and go to the "Change your reply" area, click "No" and send. You can verify that your reservation has been canceled by looking in the red striped "No" section to see all who have declined (including you). Also, most email systems allow you to "flag" an important email to make it easy to find in the future. If you flag it you can find it again EASILY (when needed) to cancel your reservation and/or delete after the cutoff. If you want to know more about this please email me at: editor@missioneas.org.

Please note that it is VERY important that you cancel if you reserved and are not going to attend. MSEA pays Maggiano's for the greater number of either reservations made (based on EVITE responses) or lunches served (allowing for walk-ins). We try to accommodate everyone but have to commit to and pay for what we reserve and order.

Q. HOW CAN I RESERVE IF I DON'T HAVE OR USE EMAIL?

A. Easy. Ask one of your MSEA friends who is responding using EVITE to include you as a guest in their reservation. They can put your name in the comments section of the Reply and you will be included in the total number of people attending.

Q. CAN I STILL CHARGE MY CREDIT CARD ON FILE AT THE MSEA OFFICE?

A. Yes. It helps if you tell us in the EVITE comments section.

Q. WHAT IF I HAVE NOT BEEN, BUT WANT TO START, RECEIVING THE EVITE INVITATIONS?

A. Call me and I will add you to the EVITE distribution list. And of course I need a VALID email address for you in order for you to receive the invitation. I am currently averaging about six email bounces with each invitation I send out.

If you have any other questions or problems send an e-mail to editor@missioneas.org.

Wanted. Items for this Year's Holiday Party Auction

The more items we have, the more money we can raise, and the more fun we'll have.

We'll be happy to auction off that nice bottle of wine you will never open or a pair of your season Sharks, 49er's or theater 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 ataxkid@pacbell.net or

Myra Thompson, EA at (408) 765-4644 or myra.J.thompson@intel.com

Monterey Area Mini Workshops 2006

The cost of each 3 hour workshop is \$40. Each workshop is IRS and CTEC approved for 3 hours of continuing education. All workshops will be held at Bay Tax Service located at 203 Calle Del Oaks, Del Rey Oaks. For more information please call (831)392-0584. Please select class(es) on the registration form and submit your registration by mail or fax. Space is limited so register early!

Topics include:

A Practical Guide to Partnerships - Part 1
A Practical Guide to Partnerships - Part 2
Schedule C - Beyond the Basics - Part 1
Schedule C - Beyond the Basics - Part 2
Community Property & Non-Resident Issues
An In-Depth Look at Retirement Plans

To register or if you have questions, call: MSEA at 1-800-832-6732. [Click here for more information and Registration Form.](#)

2007 Cast-In-Concrete Seminar

Monday, January 8th
 Morning Session - 8:30 am - 12:10 PM
 Vicki L. Mulak, EA, CFP
2006 Tax Legislation Conformity/Nonconformity Credits, Non-Residents, BOE, EDD

Afternoon Session - 1:10 PM - 4:50 PM
 Claudia Hill, EA, MBA
2006 Tax Legislation - A Forms Based Approach

Where:

Santa Clara Elks Lodge
 1680 Martin Ave, Santa Clara, CA

For further info contact MSEA Office at 1-800-832-6272 or [click here for more information and registration form.](#)

Tax Manager Wanted

Position for experienced preparer with strong Individual and some Small Entity domestic tax experience interested in an established and still growing firm. Work flexible schedule without supervision. Full-time in season and flexible off-season schedule available. Contact Kirk Knight at 877-375-9305.

1040 Review & Update Seminar

The Mission Society in conjunction with ClientWhys presents the *1040 Review & Update Seminar* November 13th and 14th, 2006 at the Wyndham Hotel, 1350 N. First Street in San Jose

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

Register by 8/31 - \$268.00
 Register 9/1 to 10/13 - \$298.00
 Register after 10/13 - \$318.00

For further info contact the MSEA office at 1-800-832-6272 or [click here for registration form.](#)

Experienced E.A. Wanted

Small Los Altos tax and financial planning firm seeking experienced E.A. for 2007 tax season; must know Lacerte and Excel, be detail oriented and have solid, 4 year individual tax background. Position requires at least 40 hours per week February 5, 2007 thru April 16, 2007. Possible long-term part-time annual position for right candidate. Starting salary \$30/hr and commensurate with experience.

Fax (650) 960-1934 or email dorothy@dhkcpa.com

C A L L E N D A R

November

Wednesday, November 01

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, November 02

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

Saturday, November 04

9:00 AM - 12:00 PM

Monterey Mini Workshops
Where: 203 Calle Del Oaks, Del Rey Oaks
Topic: *Community Property and Non-Resident Issues*
Instructor: Robert Goodfellow, EA
Fee: \$40 for the 3 hour workshop
For more information contact 831-392-0584

Wednesday, November 08

8:00 AM - 9:00 AM

Practice Management SIG
The SIG meetings will be held the second Wednesday of each month at Coco's Restaurant at 1260 Oakmead Parkway (corner of Lawrence Expressway and Oakmead Parkway, off Hwy 101). The meetings start at 8:00 a.m. and lasts for 1 hour.

If you are interested in attending the Practice Management SIG 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.

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 09

9:00 AM - 12:00 PM

Monterey Mini Workshops
Where: 203 Calle Del Oaks, Del Rey Oaks
Topic: *A Practical Guide to Partnerships - Part 1*

Instructor: Elizabeth Williams, EA
Fee: \$40 for the 3 hour workshop
For more information contact 831-392-0584

1:00 PM - 4:00 PM

Monterey Mini Workshops
Where: 203 Calle Del Oaks, Del Rey Oaks
Topic: *A Practical Guide to Partnerships - Part 2*

Instructor: Elizabeth Williams, EA
Fee: \$40 for the 3 hour workshop

For more information contact 831-392-0584

Saturday, November 11

9:00 AM - 12:00 PM

San Jose Mini Workshop
Where: Santa Clara Elks Lodge
1680 Martin Av, Santa Clara CA
Topic: TBA

Instructor: TBA

Fee: \$30

Registration & questions: MSEA Office
800-832-6732 or office@missioneas.org

Monday, November 13

8:00 AM - 4:30 PM

The Mission Society in conjunction with ClientWhys presents the *1040 Review & Update Seminar* November 13 and 14 at the Wyndham Hotel, 1350 N. First Street, San Jose

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 after 10/13 - \$318.00

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

9:00 AM - 12:00 PM

Monterey Mini Workshops
Where: 203 Calle Del Oaks, Del Rey Oaks
Topic: *Community Property and Non-Resident Issues*

Instructor: Robert Goodfellow, EA

Fee: \$40 for the 3 hour workshop

For more information (831) 392-0584

Tuesday, November 14

8:00 AM - 4:30 PM

The Mission Society in conjunction with ClientWhys presents the *1040 Review & Update Seminar* November 13 and 14, 2006 at the Wyndham Hotel, 1350 N. First Street, San Jose

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 after 10/13 - \$318.00

For further info contact MSEA Office at 1-800-832-MSEA (6732)

Wednesday November 15

8:30 AM - 10:00 AM

Membership Committee
Where: Holder's Country Inn
998 S. De Anza Blvd. San Jose
408-244-279

Contact: Tom Chun to RSVP tomshun@yahoo.com

6:30 PM - 8:30 PM

Monterey Satellite Meeting
Lugano's Swiss Bistro in Carmel

Speaker: James Kinsey

Topic: *IRS Update*

Cost of dinner and education is \$20 payable to MSEA. RSVP to Bay Tax Service at (831)392-0584 or taxpro@baytaxservice.com

Tuesday, November 21

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: Alan Pinck

Topic: *Mortgage Interest Deductibility*

Alan has spoken at mini's previously and is presenting a mini this year also, he also a current MSEA Board Member.

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.

December

Friday December 1

9:00 AM - 12:00 PM

Monterey Mini Meetings
Where: 203 Calle Del Oaks, Del Rey Oaks
Topic: *An In-Depth look at Retirement Plans*

Instructor: Margaret Dunn, EA

Fee: \$40 for the 3 hour workshop

For more information contact 831-392-0584

Wednesday December 6

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 December 7

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 December 13

8:00 AM - 9:00 AM

Practice Management SIG. The SIG meetings will be held the second Wednesday of each month at Coco's Restaurant at 1260 Oakmead Parkway

C A L L E N D A R

(corner of Lawrence Expressway and Oakmead Parkway, off Hwy 101). The meetings start at 8:00 a.m. and last for 1 hour.

If you are interested in attending the Practice Management SIG 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.

11:30 AM - 12:30 PM

City Dinner

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

Tuesday December 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

This is our Special December Luncheon. Mark your calendars for this event, auction items are needed, please contact Alan Pinck or Myra Thompson if you have something to donate, wine, auto's, etc. 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 December 26

6:30 PM - 9:00 PM

Palo Alto Meeting
No Meeting in December

Wednesday December 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

January

Wednesday January 3

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 January 4

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

Monday January 8

8:30 AM - 5:00 PM

2007 Cast-In-Concrete Seminar

Monday, January 8th - Morning Session
8:30 am - 12:10 pm

Vicki L Mulak, EA, CFP

2006 Tax Legislation Conformity/Non-conformity Credits, Non-Residents, BOE, EDD

Afternoon Session - 1:10 pm - 4:50 pm
Claudia Hill, EA, MBA

2006 Tax Legislation - A Forms Based Approach

Santa Clara Elks Lodge
1680 Martin Ave, Santa Clara, CA

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

Wednesday January 10

8:00 AM - 9:00 AM

Practice Management SIG
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If you are interested in attending the Practice Management SIG 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.

11:30 AM - 12:30 PM

City Dinner

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

Tuesday January 16

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: Mark Buckley, Head of Santa Clara County, Business Property Tax Div.

Topic: *Business Property Taxes, form 571L, appeals, audits, etc.*

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 January 23

6:30 PM - 9:00 PM

Palo Alto MSEA Dinner Meeting
Ming's Restaurant
1700 Embarcadero Road, Palo Alto
Registration and Networking: 6:00 pm
Dinner: 6:30 - 8:00 pm

Speaker: TBA

Topic: TBA

Dinner fee is \$33 in advance and \$38 at the door.

RSVP: MSEA office
office@missioneas.org or 1-800-832-6732

Wednesday January 24

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.