



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

September 2006 / Volume 2 / Issue 5

Board of Directors

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Directors - First Year of Two Year Term

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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.missionneas.org
office@missionneas.org

President's Communication

You should have already received our 2006-2007 Education Program packages, which includes registration forms for all of the seminars and workshops being presented by the Mission Society, plus two Education Vouchers. Thanks to George Vogel, Education Committee Chair and all of Education Committee Members for working very hard to provide us the best education programs!

Please contact George if you have any questions regarding the seminars for the upcoming year. Do not forget to use the coupons when signing up for the classes.

If you want to hear a specific topic or if you have an idea for a good topic, then please inform George or anyone on the Education Committee. We are always looking forward to improving and meeting your needs. We cannot provide the education you want to get unless you tell us.

There are two locations offering the Mini Workshops this year:

A. San Jose area: Class begins on September 9. You can sign up for 7 workshops for \$180, or pay \$30 each.

B. Monterey area: Class starts on September 29. The cost of each 3-hour workshop is \$40.

Please register early! Space for the Mini Work-

shops is limited.

On October 23 and 24, we will offer a two-day seminar. The topic of the first day is *Post Mortem Estate Planning – Estate/Financial planning for Baby Boomers*. The second day's topics are *1040NR: When & How to Prepare*, and *AMT issues*. Please sign up for either day or both days by October 12 for the early bird special rate.

The 12th Annual Tax Practitioner/IRS – Town Hall Meeting takes place on September 21 at the Radisson Hotel in Stockton. IRS experts will clarify issues and hot topics that are important to you and your tax practice.

We have the State Liaison meeting in Sacramento on September 22. If you want to hear what is happening at FTB, EDD, or BOE, or if you are having any issues with these agencies, this meeting is a must. The CSEA Board and committee meetings will be held on Saturday and Sunday in Sacramento on September 23rd and 24th. These meetings are open to all members.

For fulfillment of your Ethics 2 hrs CPE requirements, you may choose between one of two classes:

1. There will be a 2 hours Ethics class in Monterey on September 27, between 4 PM and 6

see *PRESIDENT* page 4

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:

George Butts

Topic: *Understanding the Post-Mortem Environment*

Monterey Meeting

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

This Month's Speaker:

Irene Lawrence, CSEA President

Topic: To be Announced

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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

Ted Danen, 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

August 15, 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 Dorothy McGinley, EA, 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 Margy Dunn, 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 that the cost of the Monterey Dinner Meeting be raised from \$17 to \$20 per attendee effective the August 2006 Meeting.

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 September 19, 2006 at 10:00 AM at Maggiano's in San Jose.

Respectfully Submitted,
Ted Danen, EA
Secretary

Experienced Tax Person Wanted

by Sunnyvale CPA firm for checking/reviewing function during 2007 tax season. Experience with Lacerte or other professional tax preparation software required. For written job description and other materials, send request to Paula Holcomb via Holcomb@LWWilliamscpa.com. Good job for a retired EA.

Enrolled Agents Wanted

Rapidly expanding nationally recognized Sacramento Tax Law Firm, seeks candidates who are Enrolled Agents able to practice before the IRS. Candidate will work with legal staff and clients, as well as negotiate with the IRS on behalf of clients. Training provided. We offer a competitive salary and benefit package. For immediate consideration, please forward resume to:

Denise Bailey,
Human Resources Recruiter
Fax (916) 338-7429 or Email
lawfirm@settletax.com

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.

Tax Preparer Wanted

Large and varied San Jose tax practice seeking experienced tax preparer for upcoming tax season. Double entry book-keeping and payroll knowledge required. Knowledge of Lacerte and Quickbooks a plus. Please respond with resume and contact information to kafeiblanco@yahoo.com.

Practice Wanted

Experienced EA would like to purchase tax only practice in Santa Clara county. All cash or terms. Seller may join firm or sell with no recourse for client retention. Call (408) 286-8483 or Phil@adaloninc.com.

WHAT'S UP

In The News

Upcoming CSEA Events

C-Star

CSEA is offering the C-Star program this year on September 7 and 8 in San Diego. It is an excellent program for anyone doing state representation work.

September 22 the State Liaison meeting in Sacramento. It is your chance to meet with FTB, EDD and SBOE executives and to hear what is happening in the state taxing agency. Please bring up any problems you are having. Find out who can help you with the problems.

September 23 and 24 is the next CSEA committees and Board meetings. All members are welcome to come and participate in the discussions.

Palo Alto Meetings

We are pleased to announce that the "Palo Alto" MSEA meetings will start up again in October or November 2006 as a dinner meeting. These meetings are intended to include both new and seasoned MSEA members and at the same time accommodate and attract members who are unable to attend a luncheon meeting. The meetings will host a guest speaker each month and offer CPE credit.

We are in the process of selecting and securing a location for our meetings. We plan to announce the date, location, speaker and tax topic in the next newsletter.

If you have any questions you can contact Jill Mendenhall at mendenhalltaxes@yahoo.com.

New Members

We would like to welcome the following new members to Mission Society of Enrolled Agents.

- Luis Berrios
- Priscilla Johnson
- Vinh Cao
- Samuel Kahn
- Wai Chai
- Bennet Perera
- Linda Colman
- Lisa Ridenour

Volunteer Teachers Needed

The IRS and EDD are looking for members of Mission Society to volunteer to teach classes to new business owners in regards to payroll issues. If you are interested you can find the [registration form](#) on the Mission Society website.

If you want more information you can contact Derek Ganter at Office: 213 576-3399 Fax: 213 576-4154 E-Mail: Derek.C.Ganter@irs.gov

E-Services

Have you registered for e-services yet? Do you have questions about e-services?

Come to the Town Hall Meeting. IRS e-services lab and personal will be available during the Town Hall Meeting to assist you.

[Click here for more information](#)

Write An Article For MSEA

Do you have something that would benefit other members of MSEA? Consider writing an article for the MSEA's 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

Seminars & Lunches

Fellow Members:

As Chairman of the Education/Luncheon Committee, I wish to congratulate the committee for putting together what we feel will be an outstanding array of "Mini Seminars" and full day Seminars. We are pleased to offer mini's both in Santa Clara and Monterey this year. We will also be offering a 2 hour *Ethics* course in both Santa Clara & Monterey in September & October, please refer to the website for details.

You should have received your flyer by now, and we are also in the process of placing them on the website under the Education section. If you have any questions please review the website or feel free to email me at vogelbkkkg@sprynet.com.

As for the lunch programs, there are speakers through January 2007. September, George Butts will speak on *Understanding the Post-Mortem Environment* (he also is presenting a ½ day on AMT on October 24th), October, Equitas Capital will return, this time to speak on *Commercial Real Estate* (also instructing at a Santa Clara mini on 1031), in November our own Alan Pinck will speak on the *Mortgage Interest Deduction* (also instructing at a Santa Clara mini-Balance Sheet/Cash Flow), December is the Xmas lunch and finally in January the head of the Santa Clara Business Property Tax Div. will speak on *Form 571L, Audits, Appeals, Etc.*

I do ask your cooperation in using the new Evite procedure or informing the MSEA office of your desire to attend by the Thursday before the luncheon. Our recent luncheon was very crowded, due to the number of walk-ins. The room we are given and in most cases the quantity of certain food items is based on the head count of RSVP's, that we give to Maggiano's based on the count from the prior Thursday to the Luncheon.

Also if you are walk-in the cost is \$30 versus \$25. Plus if it appears we have an accommodation problem, you may be asked to wait outside, till the members who have RSVP'd are seated.

If you RSVP and your plans change, please cancel by the Thursday before the Luncheon. Otherwise except for extenuating circumstances you will be expected to reimburse MSEA \$25 for lunch, since we have had to guarantee and pay whether you show or not.

Thank you in advance for support and cooperation.

George P. Vogel, Chairman

PRESIDENT • *continued from pg 1*

PM. before the monthly meeting. If you are interested, please call 831-592-0584 for location information.

2. If you sign up for both days of the October 23 & 24 Seminar or San Jose area entire Mini Workshops, then the two hour Ethics class on October 24 (from 6 PM to 8 PM) is free of charge; otherwise, it will be \$20 fee for attending this two hour Ethics class.

Special thanks to Irene Lawrence, EA, for her commitment as the Ethics speaker of both classes, she is the President of CSEA and also is the Mission member.

Thanks for your support!

George Pan, EA

President of MSEA

Phone: (408) 727-8011

Email: panpadgett@comcast.net

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! 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 questions, call: MSEA at 1-800-832-6732. [Click here for more information and Registration Form.](#)

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12th Annual Tax Practitioners/IRS Town Hall Meeting

Radisson Hotel Stockton
 2323 Grand Canal Blvd., Stockton CA 95207
 Hwy. I-5 at March Lane
 Thursday, September 21, 2006
 8:30 a.m. – 4:30 p.m.
 Registration begins at 7:30 a.m.

Mission Possible: Deciphering the Code
 Do the Code, Regulations, Rulings, Policies and Procedures seem taxing and cryptic at times? Let IRS Subject Matter Experts clarify issues and hot topics of importance to you and your tax practice. Get the latest including:

- Examination Programs and Focus on Lessening the Tax Gap
- Most Litigated Tax Issues and Most Serious Problems Encountered by Taxpayers
- Updates to Collection Due Process Hearings
- How you and your business clients (who receive cash payments) may be affected by Title 31...are you sure you know the rules?

Navigating the IRS...and Registering for IRS e-Services

[Click here for Registration Form](#)

1040 Review & Update Seminar

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

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

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

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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

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.](#)

October Education Event - 2 Days

Monday October 23

8:30 am – 5:00 PM

Post Mortem Estate Planning

Estate/Financial Planning for Baby Boomers

Arthur Joseph Werner, ESQ

Tuesday October 24

8:15 am – 12:00 PM

1040NR: When & How to Prepare

Jeffrey Tarnowski, CPA

1:00 PM – 4:45 PM

AMT

George Butts

Where: Santa Clara Elks Lodge #2347, 1680 Martin Ave Santa Clara

EARLY BIRD SPECIALS

(Postmark by October 12, 2006)

CSEA Member/Staff

\$330 both days

\$165 1 day

Non-Member

\$350 both days

\$175 1 day

REGULAR FEES

CSEA Member/Staff

\$360 both days

\$180 1 day

Non-Member

\$380 both days

\$190 1 day

SPECIAL! Sign up for both days and the 2 hrs Ethics program is included Tuesday 6 PM – 8 PM

Speaker: Irene Lawrence EA, President of CSEA

To register or questions, call: MSEA at 1-800-832-6732. [Click here for more information and registration form](#)

San Jose Area Mini Workshops

All Workshops will be held on Saturdays 9:00 AM to 12:00 noon except *Ethics*.

\$30.00 Each Mini Workshop (3 CPE Hours)

OR

\$180.00 for all 7 Mini Workshops (20 CPE Hours)

3 CPE Hours for EAs, CPAs, and CTEC per Mini Workshop except *Ethics*.

Where: Santa Clara Elks Lodge 1680 Martin Ave., Santa Clara, CA

For questions or more information, please call 1-800-832-6732 or Email: office@missioneas.org or [click here to go to the registration page](#)

Ethics Program

Date:

Tuesday October 24th, 6:00–8:00 PM

Cost: \$20

Location:

Santa Clara Elks Lodge #2347, 1680 Martin Ave., Santa Clara

Speaker:

Irene Lawrence, EA President of CSEA

[Click here for registration form](#)

September

Wednesday, September 06

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

Thursday, September 07

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, September 9

9:00 AM - 12:00 PM
 San Jose Mini Workshop
 Santa Clara Elks Lodge
 1680 Martin Ave., Santa Clara
Topic: *The Post-Death Process/Form 706*
Instructor: Ray Sheffield, Attorney
 Fee: \$30
 Registration and info: (800) 832-6732
 e-mail: office@missioneas.org

Wednesday, September 13

8:00 AM - 9:00 AM
 Practice Management SIG
 2nd Wed. of each month at Coco's Restaurant, 1260 Oakmead Pkwy. Meetings start at 8:00 a.m. and last for 1 hour. If you are interested in attending 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

Saturday, September 16

9:00 AM - 12:00 PM
 San Jose Mini Workshop
 Santa Clara Elks Lodge
 1680 Martin Ave., Santa Clara
Topic: Tax Law Changes for Expatriates
Instructor: Jeff Tarnowski, CPA
 Fee: \$30
 Registration and info: (800) 832-6732
 e-mail: office@missioneas.org

Tuesday, September 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
Speaker: George Butts
Topic: *Understanding the Post-Mortem Environment*
 RSVP by Thursday prior to the meeting to receive the \$25 price. Reservations af-

ter that or at the door will be \$30. RSVP to the office at 800-832-MSEA (6732) or office@missioneas.org.

Thursday, September 21

8:30 AM - 4:30 PM
 12th Annual Tax Practitioner/IRS – Town Hall Meeting
 Registration begins at 7:30 AM
 Radisson Hotel Stockton
 (209) 957-9090
 2323 Grand Canal Blvd., Stockton
 Hiway I-5 at March Lane
 Registration Fee \$125, \$150 after Aug. 31 (Includes Continental Breakfast, Lunch & Refreshments) Registration questions? Phone: (209) 532-4053, ext 0 or e-mail to: tax@flavinea.com

Saturday, September 23

9:00 AM - 12:00 PM
 San Jose Mini Workshop
 Santa Clara Elks Lodge
 1680 Martin Ave., Santa Clara
Topic: *Schedule C in depth*
Instructor: Dorothy Lang, EA
 Fee: \$30
 Registration and info: (800) 832-6732 or e-mail to: office@missioneas.org

Wednesday, September 27

8:30 AM - 9:30 AM
 Membership Meeting
 The meeting will be held at Holder's Country Inn at 998 S. De Anza Blvd, San Jose. The phone number is 408-244-2798.

RSVP to Tom Chun, EA at TomPChun@yahoo.com or 650-387-2756.

4:00 PM - 6:00 PM

There will be a 2 hour Ethics class presented in Monterey by Irene Lawrence, EA. Please call Bay Tax Service at (831)392-0584 for location information. Cost of the class is \$25.

6:30 PM - 8:30 PM

Monterey Satellite Meeting - Lugano's Swiss Bistro in Carmel
Speaker: Irene Lawrence, CSEA Pres.
Topic: To be Announced
 Cost of dinner and education is \$20.
 RSVP to Bay Tax Service at (831)392-0584 or taxpro@baytaxservice.com

Thursday, September 29

9:00 AM - 12:00 PM
 Monterey Area Mini Workshop
 203 Calle Del Oaks, Del Rey Oaks
Topic: Schedule C - Beyond the Basics 1
Instructor: Robert Goodfellow, EA
 Fee: \$40 for the 3 hour workshop
 For more information call (831)392-0584

1:00 PM - 4:00 PM

Monterey Area Mini Workshop
 203 Calle Del Oaks, Del Rey Oaks
Topic: Schedule C - Beyond the Basics 2
Instructor: Robert Goodfellow, EA
 Fee: \$40 for the 3 hour workshop
 For more information call (831)392-0584

Saturday, September 30

9:00 AM - 12:00 PM
 San Jose Mini Workshop
 Santa Clara Elks Lodge
 1680 Martin Ave., Santa Clara
Topic: *1031 Exchange, Process and Problems*
Instructor: Marc LeGette
 Fee: \$30
 Registration and info: (800) 832-6732 or e-mail to: office@missioneas.org

October

Tuesday, October 03

6:30 PM - 9:30 PM
 Monterey Area Mini Workshop
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

Wednesday, October 04

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, October 05

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, October 07

9:00 AM - 12:00 PM
 San Jose Mini Workshop
Where: Santa Clara Elks Lodge
 1680 Martin Ave., Santa Clara
Topic: *Tax Ramifications of 1031 Exchanges*
Instructor: John Field, EA
Fee: \$30
Registration and questions: MSEA Office
 800-832-6732 or office@missioneas.org

Tuesday, October 10

6:30 PM - 9:30 PM
 Monterey Area Mini Workshop
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
 More information contact 831-392-0584

Wednesday, October 11

8:00 AM - 9:00 AM
 Practice Management SIG
 The SIG meetings will be held the sec-

C A L L E N D A R

ond 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 AM 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 - khaughton@juno.com
 RSVP by e-mail requested

Tuesday, October 17

10:00 AM - 11:30 AM

Board Meeting MSEA

10:30 AM - 11:45 AM

Member Orientation
What: Come find out all the benefits to belonging to Mission Society of Enrolled Agents. We want to make sure that you are getting everything you want out of MSEA.
Where: This meeting will be at Maggiano's Little Italy in Santana Row.
Cost: Free

Immediately afterwards we will be having the San Jose Lunch meeting. If you want to attend the Lunch meeting make sure you RSVP separately. The fee for the lunch is \$25 if you RSVP by 10/12/16 and \$30 afterwards or at the door.

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: Equitas Capital
Topic: *Commercial Real Estate*, discussing cost mgmt., tax advantages, cash flow, useful write-offs, etc. Equitas Capital has spoken at previous luncheon and was well received and is also presenting a mini on 1031 transactions. 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

Thursday, October 19

6:30 PM - 9:30 PM

Monterey Area Mini Workshop
Where: 203 Calle Del Oaks, Del Rey Oaks
Topic: *Schedule C Beyond the Basics - Part 1*
Instructor: Robert Goodfellow, EA

Fee: \$40 for the 3 hour workshop
 More information contact 831-392-0584

Saturday, October 21

9:00 AM - 12:00 PM

Monterey Area Mini Workshop
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
 More information contact 831-392-0584

9:00 AM - 12:00 PM

San Jose Mini Workshop
Where: Santa Clara Elks Lodge
 1680 Martin Ave., Santa Clara
Topic: *Accounting Basics, Balance Sheet and Cash Flow*

Instructor: Alan Pinck, EA
Fee: \$30
Registration and questions: MSEA Office
 800-832-6732 or office@missioneas.org

Monday, October 23

8:30 AM - 5:00 PM

October Education Event - 2 Days
Post Mortem Estate Planning
Estate/Financial Planning for Baby Boomers
 Arthur Joseph Werner, ESQ

SPECIAL! Sign up for both days and the 2 hours Ethics program is included. See the Education page for more details.

Tuesday, October 24

8:30 AM - 5:00 PM

October Education Event - 2 Days
 8:15 to 12:00
1040NR: When & How to Prepare
 Jeffrey Tamowski, CPA

1:00 to 4:45

AMT
 George Butts

6:00 to 8:00

Ethics
 Irene Lawrence, EA

SPECIAL! Sign up for both days and the 2 hours Ethics program is included. See the Education page for more details.

6:00 PM - 8:00 PM

Ethics Class
 Where: Santa Clara Elks Lodge
 1680 Martin Ave., Santa Clara
Speaker: Irene Lawrence, EA
 President of CSEA
Topic: *Ethics*
Cost: \$20 - Free if you attend both the October 23 and 24th two day event.

Wednesday, October 25

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

Thursday, October 26

6:30 PM - 9:30 PM

Monterey Area Mini Workshop
Where: 203 Calle Del Oaks, Del Rey Oaks
Topic: *Schedule C Beyond the Basics - Part 2*
Instructor: Robert Goodfellow, EA
Fee: \$40 for the 3 hour workshop
 More information contact 831-392-0584.