



Mission Society of Enrolled Agents

A California Non-Profit Mutual Benefit Corporation

September 2007 / Volume 3 / Issue 7

Board of Directors

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1 Year Term

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of Two Year Term

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of Two Year Term

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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.missioneas.org

office@missioneas.org

President's Communication

Last month I went to the PLM (Practitioner Liaison Meeting). What is the PLM? It is where managers from the IRS sit down with us so we can discuss issues we have with the IRS and employees of the IRS. If you have ever done an audit or filed a Power of Attorney you will be surprised at the knowledge you will get from these meetings. The next one is on November 15th, plan on attending. The IRS keeps trying to cut back on these but due to James Kinsey's (of the IRS) persistence, they continue. Thanks James!

Monterey has changed their meeting from dinner to lunch. They saw an increase in participation for the event and will continue as a lunch meeting on a trial basis. In July I went down and saw George Butts speak. What a wealth of knowledge, and it was well worth my drive to the Monterey area.

Last night was the SJ Giants game for MSEA. Great food, great company, great game, and fireworks. This was the second event and I hope that we will have it again next year. We had 34 in attendance last night. Watch for our next social event which is going to be a day at the horse races.

Mentoring – would you be interested in being a mentor for one of our society's new members? If so drop me a line.

If you see any way the MSEA could better serve our members, please bring it to my attention. randy@4taxman.com or 408-445-1151.

Randy Warshawsky, EA

(408) 445-1151

Randy@4taxman.com

CSEA, EA of the Year Award



Karen Fihn won the EA of the Year Award presented by CSEA at the 2007 Annual Meeting in Ventura in June.

Karen, past president of MSEA, is conscientious in her efforts to promote the professionalism of enrolled agents and is dedicated in her work for MSEA, CSEA, and NAEA.

This award is well deserved.

Congratulations, Karen!

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

Speaker: Jennifer MacMillan, EA
President CSEA

Topic: *Federal Representation Update*

Monterey Meeting

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

Speaker: James Kinsey, IRS

Topic: *IRS Update*

Palo Alto Meeting

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

Speaker: Claudia Hill

Topic: *Increase of Preparer Penalties/Effect of June 07 Tax Bill*

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Committee Chairs:

Awards

Viola Nosinger, EA

Budget & Finance

Russell Barnett, EA

By Laws

Rosemary Hernandez, EA

Communications

/Newsletter

Dorothy McGinley, EA

CTEC Representative

John Oliver, EA

Disaster Services

Karen Fihn, EA

Education

George Vogel, 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)

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 21, 2007

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

Roll call was taken. Following Board Members were present:

President Randy Warshawsky, EA, President Elect President & CSEA Director Myra Thompson, EA, Vice President Alan Pinck, EA, Secretary Jaswant S. Jessie, EA, Immediate Past President George Pan, EA, Treasurer Russell Barnett, EA. CSEA Director James Houston, EA, Directors Arnold Pinck, EA, Dorothy Lang, EA, Jill Mendenhall, EA, Sam Trinh, EA, Torie Charvez, EA and Wai Ling Chai, EA

Visitors: John Oliver, EA and George Vogel, EA

Board member absent: Directors Ilse Beck, EA and Margy Dunn, EA

Minutes of the last meeting were accepted as presented.

TREASURER'S REPORT: Was reviewed.

COMMITTEE AND ORGANIZATION REPORTS: Were presented.

OLD BUSINESS: No motions were made.

NEW BUSINESS:

Budget 2006-2007

A motion was made by Russell Barnett, EA Budget Committee Chair and approved unanimously

Affiliation Agreement with CSEA

A motion was made by Jaswant S Jessie, EA and Second by Torie Charvez, EA/ James Houston, EA and approved unanimously

ADJOURNMENT:

There being no further business, the board meeting was adjourned at 11:28 AM by President Randy Warshawsky, EA.

The next meeting is scheduled for September 18, 2007 at 10:00 AM at Maggiano's, in San Jose, CA.

Respectfully Submitted,
Jaswant S. Jessie, EA
Secretary

IRS Town Hall Meeting

Save the Date - Town Hall Meeting

Thursday, September 27, 2007

8:30 AM - 4:30 PM

Radisson Hotel

1471 N 4th St., San Jose 95112

Help Wanted:

Office Administrative Assistant

Established tax office in Hayward is seeking an experienced Office Administrative Assistant. 2 years current experience preferred. This is a part time position but will become full time during tax season. Work is in a contemporary and pleasant office environment.

Responsibilities include: answering phones, setting up appointments, greeting clients, filing, some data entry, and assembling tax returns. Other duties as assigned. Must be computer literate and have proficiency in Excel and Word. Must be able to multi-task and be capable of working in a fast paced environment. Must be able to meet deadlines and set priorities. Attention to detail is essential. Good written and oral skills are required.

Please fax a copy of your resume including a cover letter and salary requirements to:

Attn: Patty Pringle, EA, Office Manager, Secure Taxes, Incorporated (510) 537-9331.

Seeking Enrolled Agent for full time position in Morgan Hill, California. Minimum three years of individual and estate tax experience preferred.

Software skills should include Lacerte, QuickBooks, Excel and Word. We are a small CPA office (7 employees) looking for someone who enjoys tax work and wants to be part of a customer service-oriented team.

Good people skills and ability to work efficiently with minimal supervision are a must. Email resume to: dolores@steinbiscpa.com.

Request for Volunteers

A special joint task force subcommittee has been created by the Public Information and Awareness Committee and the Membership and Chapter Development Committee. Technology and its use is an integral part of all of our practices and the CSEA Board of Directors has the foresight to address it.

The membership of the committee is set. What we need are supporting members to help with some of the work. Frequently, our members tell us that they don't have the time to be involved with our society. This is a great way for our members to "help us to help you" without devoting more time than they can afford to give nor leave their home area.

The first task the subcommittee would like to address is the CSEA website. We need members who can review and comment on various pages of the website. Please ask the members of your chapter to volunteer for this important project that will pay dividends for all of us.

Thank you.

Norman M. Golden, EA
Chair, CSEA Technology Subcommittee
1065 East Hillsdale Boulevard, Suite 109
Foster City, CA 94404-1688
650-212-1040

650-212-1044 Fax
www.goldentax.com

1040 Review & Update

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

November 12 and 13, 2007 at the Radisson Hotel San Jose Airport

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 2007 and help your clients plan for 2008 and future years. See the Mission website for information and registration. (*See information and registration form on page 10.*)

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.

Do You Know MSEA History?

On the 30th birthday of MSEA a group of members combined their knowledge to present the history of MSEA at our anniversary party. We are trying to find a copy to post up on our website. If you have a copy could you please send it to Randy. If you know someone who may have it, send Randy who so he can follow up with them.



Year Round

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

**** Available Now ****

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

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.

Office Space For Rent

An office space is available in an office shared by two other EAs. This office is located in Sunnyvale on El Camino Real. Please contact Ben-net Perera, EA at (408) 481-0500.

CSEA Audio Tax Entity Series

Dear CSEA/NAEA Members, Affiliates, Associates, and Prospective Members:

A CSEA Audio Tax opportunity you cannot afford to miss. The Audio Tax Entity Series presented by Vicki Mulak, EA, CFP!

- *August 1, 2007 - Choice of Entity
- *September 5, 2007 - Partnerships
- *October 3, 2007 - S-Corporations

CSEA Members, Affiliates and Associates - All 3 sessions for \$125! This is a \$25 savings off of the regular Audio Tax registration fee. (\$50 per session if you register for 1 or 2 of the sessions)

Non-Members - All 3 sessions for \$200. (\$75 per session if you register for 1 or 2 of the sessions)

For more information or to register, go to www.csea.org/audiotax/ or call CSEA at 800/777-2732.

If you have any questions, please contact CSEA at 800/777-2732. We look forward to your participation in these events!

If you have already registered, thank you! You will receive a registration acknowledgement via email. For information on other upcoming Audio Tax sessions go to: <http://www.csea.org/audiotax/>.

Help Wanted: Tax Professional/Seasonal

Established tax office in Hayward is seeking an experienced tax professional. EA with a minimum of 2 years current experience preferred.

Work is in a contemporary and pleasant office environment.

Responsibilities include preparation of simple to complex tax returns for individuals and small businesses. 2 yrs + experience using Lacerte Tax Software; assemble returns for signature, use of work papers & documentation management.

Successful candidate should have good communication skills and be computer literate.

Please fax a copy of your resume including a cover letter and salary requirements to:

Attn: Patty Pringle, EA, Office Manager, Secure Taxes, Incorporated (510) 537-9331.

CSEA's Legislative Out-REACH 07-08 SpEAK Tax and Have Your Voice HEARD!

November 2007 – January 2008

CSEA needs every Member (that means YOU) to get involved in CSEA's Legislative OutREACH 07-08. During November, December, and January, CSEA is activating its grass-roots 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.

The CSEA Legislative Affairs Committee is hard at work to make it as easy as possible for each Chapter to do their part. CSEA will provide the Chapter Legislative Chair or Chapter President with all of the tools needed to arrange legislative visits in the Senate and Assembly Districts that fall within our Chapter's boundaries. CSEA will also provide those who volunteer to participate with tips on scheduling and making a visit, talking points, a packet of information to take on the visit, and much more.

Contact the Chapter Legislative Chair or Chapter President if you are interested in participating. CSEA needs participation from as many Members as possible to make this successful. Please do your part to help spread the word on Enrolled Agents.

If you do not know how to contact the Chapter Legislative Chair or President or if you have any questions, contact Bronwyn Hughes at CSEA at 800/777-2732 or bhughes@csea.org and Bronwyn will answer your questions and/or forward your information to your Chapter Legislative Chair or President.

2007 Preparation Classes for Special Enrollment Exam

Presented by:
Mission Society of Enrolled Agents



Part I *Individuals*
Dates: July 28, August 4, 11
Break to take exam on Part 1

Part II *Business*
Dates: Aug. 25, Sept. 8, 15, 22
Break to take exam on Part 2

Part III
Representation, Practice, Procedures
Dates: October 6, 13, 20
Break to take exam on Part 3

Time: Saturdays 9:00 am to 3:30 pm (Lunch not provided)

Locations: Telesky Financial Services & Rosemary Hernandez & Associates, 2095 Park Ave San Jose

Instructors: Alan Pinck EA, Arnie Pinck EA, Dorothy Lang EA, & Rick Hillsbery EA,

Class Fees: Part I - \$225
Part II - \$225
Part III - \$225
All three parts - \$600

Early Bird Discount register by June 12 - **\$525**.
Text Books included in class fee.

To register call: MSEA (800)832-6732 or fax form to (408)371-8677

Scholarships available: Contact MSEA website www.missioneas.org

To apply for Enrollment: www.irs.gov/tax pros/agents

To schedule exam: www.prometric.com/irs

For more information contact Ilse Beck at (408)267-8234 or ilsebeck@ips.net.

Visiting the Fresno Campus

Would you be interested in visiting the Fresno campus? If you would, send an e-mail to James Kinsey. In the subject line put "I want to visit Fresno" The address is: James.R.Kinsey@irs.gov

If they see enough interest and understand why, maybe we can get a tour of the service center. In the text of the e-mail tell James what you would be interested in seeing and why.

CSEA/State Tax Agencies Liaison Meeting

CSEA members, affiliates, and associates! This is YOUR opportunity to improve California tax administration!

Register TODAY for the CSEA/State Tax Agencies Liaison Meeting.

This is a meeting with the leadership of the Franchise Tax Board (FTB), Employment Development Department (EDD) and Board of Equalization (BOE). The agencies provide responses to topics/questions submitted to the agencies in advance and representatives will also take questions from the floor. If you deal with the FTB, EDD, and/or BOE you cannot afford to miss this exchange!

Here is what attendees had to say about last year's CSEA/State Tax Agencies Liaison Meeting.

- This is one of the best meetings I've attended in a long time!
- Thank you for providing this very beneficial forum.
- Fascinating topics!
- Great dialogue!

When: Friday, September 7, 2007, 8:30 a.m. - 4:00 p.m. (Registration opens at 8:00 a.m.)

Where: Marriott Courtyard Sacramento Cal Expo, 1782 Tribute Road Sacramento, CA 95815

Cost: members - \$80; non-members - \$95

CPE: 6 hours (NAEA/CSEA); 6 CA hours (CTEC# 1001-CE-2886) This event does not qualify for IRS hours because the subject matter is not federal tax law.

Register TODAY - www.csea.org/events, call CSEA at 800/777-2732, or fax the attached registration form on page 9 to 916/366-6674.

We look forward to seeing you there!

From George Vogel, Education Chair

Fellow MSEA Members:

As your Education Chairman, I want to share with you what the Education Committee has put together for the 2007/08 Education year.

“Mini Workshops” beginning Saturday, September 8th with the first topic “Practice Development”, followed by 5 more mini’s on following Saturdays 9-15, 9-22, 9-29, 10-06 and 10-20, covering various topics in areas that MSEA mini’s have not covered in the last several years.

On Thursday, September 27th, MSEA with 5 other chapters is sponsoring the annual “Town Hall Meeting”. Since we are the host, it will be at the San Jose Airport Radisson on North 4th St. You will receive 7 hours of CPE on a variety of topics for only \$125 early bird (includes lunch). Two hours of the session will be spent on CP2000 and “Current Audit Procedures”; there will be representatives from Fresno that are involved with this day to day. See flyer for more details about the other presentations.

On November 12 and 13th, Client Whys will be holding a 1040 Review & Update Seminar. MSEA receives a rebate for each member who attends, so if attending, please mark MSEA member on the registration.

On Monday, January 7th, MSEA will present the “Annual Cast in Concrete Seminar” with Vicki Mulak and Claudia Hill as speakers.

All of the seminars have event details on the MSEA website at the “Education Events” tab.

MSEA needs the support of its members, to continue to offer the type of education seminars we now have.

As always if you have any questions about registration or events, please send me an email @vogelbkkg@sprynet.com and I will endeavor to take care of it.

George P. Vogel EA
Education Chairman

Welcome New Members

- Jonathan Hill EA
- Linda Hudson EA
- Stanley Matsuo EA
- Linda Nebenzahl EA

Mini Workshop Seminars

Location: Santa Clara Elks Lodge
1680 Martin Ave.
Santa Clara, CA 95050

Time: 9:00 AM – 12 Noon
Registration begins at 8:30AM

Cost: \$35 each (\$180 for all 6)
before 9/01/07
\$40 each (\$210 for all 6)
after 8/31/07

Saturday, September 8

Topic: *Practice Development*
Speaker: Open Forum w/Speaker Panel

Saturday, September 15

Topic: *Flow Through Entities*
Speaker: Torie Chavez

Saturday, September 22

Topic: *Depreciation Brush Up*
Speaker: Dorothy Lang

Saturday, September 29

Topic: *Funding Trusts*
Speaker: Raymond Sheffield

Saturday, October 6

Topic: *Mortgage Interest*
Speaker: Alan Pinck

Saturday, October 20

Topic: *Sales Tax*
Speaker: To be announced

All Day Seminar

Tuesday, October 30
8:30 AM – 5:00 PM

Registration begins at 8:00 AM
3 terrific speakers, 4 important topics
Roxanne Nelsen – California Non-resident Return
Irene Lawrence – Ethics
George Butts – Sale of Business Property Cost Segregation

Fee: \$165 before 10/1/07
\$185 after 9/30/07

Santa Clara Elks Lodge
1680 Martin Ave.
Santa Clara, CA 95050

C A L L E N D A R

September

Wednesday, September 5

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, September 6

11:30 AM - 12:30 PM

Special Interest Group
Estates and Trusts
City Diner
1160 Blossom Hill Road, San Jose
Contact: Randi Clarke EA 408-973-9300
RSVP requested by email to
randi_tax@yahoo.com

Saturday, September 8

9:00 AM to 12 Noon

Mini Workshop Seminar
Topic: Practice Development
Speaker: Open Forum w/Speaker Panel
Registration begins at 8:30 AM
Fee: \$35 before 9/1/07; \$40 after 8/31/07
Santa Clara Elks Lodge
1680 Martin Ave.
Santa Clara, CA 95050

Wednesday, September 12

11:30 AM - 12:30 PM

Tax Support Group
City Diner
1160 Blossom Hill Road, San Jose
For information contact
Beverly Haughton at (408) 356-4832.
RSVP by e-mail requested to
khaughton@juno.com

Saturday, September 15

9:00 AM to 12 Noon

Mini Workshop Seminar
Topic: Flow Through Entities
Speaker: Torie Chavez
Registration begins at 8:30 AM
Fee: \$35 before 9/1; \$40 after 8/31
Santa Clara Elks Lodge
1680 Martin Ave.
Santa Clara, CA 95050

Tuesday, September 18

10:00 AM - 11:45 AM

San Jose Board Meeting
11:45 AM - 1:30 PM
San Jose Meeting - Maggiano's Little Italy in Santana Row in San Jose
Speaker: Jennifer MacMillan, EA, President CSEA
Topic: *Federal Representation Update*
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@missionreas.org

10:30AM-11:45AM

New Member Orientation
Please join us for new member orientation and learn about the benefits of your membership in MSEA. We want you to be able to utilize the benefits membership has. EAs are eager to help out fellow EAs. You will hear about Education, Practice Management, CSEA, NAEA, and more.

Watch for our upcoming flyer!

Maggiano's Little Italy
Santana Row, 3055 Olin Ave., #1000
San Jose, CA 95128

Please RSVP on or before 09/13/07.
Contact: Jill Mendenhall 408-617-0391 or the MSEA office 800-832-6732

1:30 PM - 2:00 PM

Membership Committee Meeting
Maggiano's Little Italy, Santana Row, San Jose

The membership committee will meet following the San Jose luncheon meeting. We are seeking new committee members so if you want to help make our membership the best that it can be, please join us. Contact Jill Mendenhall (408) 617-0391.

Thursday, September 20

12:00 PM - 1:30 PM

Tarpy's Roadhouse
2999 Monterey Salinas Hwy., Monterey
Speaker: James Kinsey, IRS
Topic: IRS Update
Cost: \$20 MSEA members / \$25 non-members
Please RSVP or more info
taxpro@baytaxservice.com
or (831) 392-0584

Saturday, September 22

9:00 AM to 12 Noon

Mini Workshop Seminar
Topic: Depreciation Brush Up
Speaker: Dorothy Lang
Registration begins at 8:30 AM
Fee: \$35 before 9/1/07; \$40 after 8/31/07

Santa Clara Elks Lodge

1680 Martin Ave.
Santa Clara, CA 95050

Tuesday, September 25

6:00 PM - 8:00 PM

Palo Alto Dinner Meeting
6:00 PM Registration
6:30 PM - 8:00 PM
Dinner and Presentation
Ming's Restaurant
1700 Embarcadero Road, Palo Alto
Speaker: Claudia Hill
Topic: *Increase of Preparer Penalties/Effect of June 07 Tax Bill*

Dinner Fee: \$30 in advance or \$35 at the door. RSVP:E-vite or contact MSEA office at 800-832-6732.

Thursday, September 27

8:30 AM - 4:30 PM

Registration begins at 7:30 AM
13th Annual Tax Practitioner/IRS Town Hall Meeting
Radisson Hotel
1471 N 4th St., San Jose

Saturday, September 29

9:00 AM to 12 Noon

Mini Workshop Seminar
Funding Trusts
Speaker: Raymond Sheffield
Registration begins at 8:30 AM
Fee: \$35 before 9/1; \$40 after 8/31
Santa Clara Elks Lodge
1680 Martin Ave.
Santa Clara, CA 95050

October

Wednesday, October 3

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 4

11:30 AM - 12:30 PM

Special Interest Group
Estates and Trusts
City Diner
1160 Blossom Hill Road, San Jose
Contact: Randi Clarke EA 408-973-9300
RSVP requested by email to:
randi_tax@yahoo.com

Saturday, October 6

9:00 AM to 12 Noon

Mini Workshop Seminar
Topic: *Mortgage Interest*
Speaker: Alan Pinck
Registration begins at 8:30 AM
Fee: \$35 before 9/1; \$40 after 8/31
Santa Clara Elks Lodge
1680 Martin Ave.
Santa Clara, CA 95050

Wednesday, October 10

11:30 AM - 12:30 PM

Tax Support Group
City Diner
1160 Blossom Hill Road, San Jose

For information contact:
Beverly Haughton at (408) 356-4832.
RSVP by e-mail requested to:
khaughton@juno.com

C A L L E N D A R

Thursday, October 18

12 Noon – 1:30 PM

Tarpy's Roadhouse
2999 Monterey Salinas Hwy., Monterey
Speaker: TBA

Topic: TBA

Cost: \$20 members / \$25 nonmembers
Please RSVP or more info
taxpro@baytaxservice.com or
(831) 392-0584

Saturday, October 20

9:00 AM to 12 Noon

Mini Workshop Seminar
Topic: Sales Tax
Speaker: To be announced
Registration begins at 8:30 AM
Fee: \$35 before 9/1; \$40 after 8/31

Santa Clara Elks Lodge
1680 Martin Ave.
Santa Clara, CA 95050

Tuesday, October 23

10:00 AM - 11:45 AM

San Jose Board Meeting

11:45 AM - 1:30 PM

San Jose Meeting - Maggiano's Little
Italy in Santana Row in San Jose|

Speaker: Roger Oakland, FTB

Topic: *California Audit Issues and Audit
Process*

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, October 23

10:00 AM - 11:45 AM

San Jose Board Meeting

11:45 AM - 1:30 PM

San Jose Meeting - Maggiano's Little
Italy in Santana Row in San Jose

Speaker: Roger Oakland, FTB

Topic: *California Audit Issues and Audit
Process*

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

6:00 PM – 8:00 PM

Palo Alto Dinner Meeting
6:00 PM Registration
6:30 PM – 8:00 PM
Dinner and Presentation
Ming's Restaurant
1700 Embarcadero Road , Palo Alto

Speaker: To be announced

Topic: To be Announced

Dinner Fee: \$30 in advance or \$35 at
the door. RSVP:E-vite or contact MSEA
office at 800-832-6732.

Tuesday, October 30

8:30 AM – 5:00 PM

All Day Seminar
Registration begins at 8:00 AM
3 terrific speakers, 4 important topics
Roxanne Nelsen

California Nonresident Return

Irene Lawrence – *Ethics*

George Butts

Sale of Business Property

Cost Segregation

Fee: \$165 before 10/1/07

\$185 after 9/30/07

Santa Clara Elks Lodge

1680 Martin Ave.

Santa Clara, CA 95050

November

Thursday, November 1

11:30 AM - 12:30 PM

Special Interest Group

Estates and Trusts

City Diner

1160 Blossom Hill Road, San Jose

Contact: Randi Clarke EA (408) 973-

9300 - RSVP requested by email to

randi_tax@yahoo.com

Wednesday, November 7

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, November 14

11:30 AM - 12:30 PM

Tax Support Group

City Diner

1160 Blossom Hill Road, San Jose

Contact: Beverly Haughton at (408)

356-4832.

RSVP by e-mail requested to

khaughton@juno.com

Thursday, November 15

12 Noon – 1:30 PM

Tarpy's Roadhouse

2999 Monterey Salinas Hwy., Monterey

Speaker: Richard Seldow, EA

Topic: *International Visitor/Worker Tax
Issues*

Cost: \$20 members / \$25 nonmembers

Please RSVP or more info:

taxpro@baytaxservice.com or

(831) 392-0584

Tuesday, November 20

10:00 AM - 11:45 AM

San Jose Board Meeting

11:45 AM - 1:30 PM

San Jose Meeting - Maggiano's Little

Italy in Santana Row in San Jose

Speaker: TBA

Topic: TBA

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, November 27

6:00 PM – 8:00 PM

Palo Alto Dinner Meeting

6:00 PM Registration

6:30 PM – 8:00 PM

Dinner and Presentation

Ming's Restaurant

1700 Embarcadero Road, Palo Alto

Speaker: Irene Lawrence

Topic: *Ethics*

Dinner Fee: \$30 in advance or \$35 at
the door. RSVP: E-vite or contact MSEA
office at 800-832-6732.

CSEA/STATE TAX AGENCIES LIAISON MEETING

SEPTEMBER 7, 2007

REGISTER ONLINE AT WWW.CSEA.ORG/EVENTS



Information & Registration:

For more information about the Liaison Meeting contact CSEA at 800/777-2732

Liaison meetings help CSEA Members establish and maintain long-term relationships with key personnel from tax agencies. These relationships provide an effective vehicle for helping to improve tax administration.

Cost: Members: \$80, Non-members: \$95
(Breakfast and lunch included)
6 hours of CPE for NAEA/CSEA/CA Board of Accountancy
6 hours of CPE for CTEC (CTEC# 1001-CE-2886)

Date: Friday, September 7, 2007
8:30 a.m.– 4:00 p.m. (registration at 8:00 a.m.)

Date/Location:
Marriott Courtyard Sacramento Cal Expo
1782 Tribute Road
Sacramento, California 95815
Hotel Rate - \$89 plus tax

DON'T MISS THIS
IMPORTANT OPPORTUNITY TO IMPROVE
TAX ADMINISTRATION

NAME _____

COMPANY _____

ADDRESS _____

CITY/STATE/ZIP _____

DAYTIME TELEPHONE _____ EMAIL _____

Please check here if you require special accommodations to fully participate and attach a description of needs.

Payment Information

Total Amount Due _____

Visa MasterCard AMEX Check enclosed

CREDIT CARD # _____ EXPIRATION DATE _____

CARDHOLDER'S SIGNATURE _____

CARD BILLING ADDRESS IF DIFFERENT THAN ABOVE _____

Fax Credit Card Registration to 916/366-6674
or mail payment to:
CSEA, 3200 Ramos Circle, Sacramento, CA 95827-2513

CANCELLATION POLICY: If your refund request is received 15 days prior to the event, your registration fee will be refunded, less \$30 cancellation charge. Registrations cancelled within 15 days of the event will not be refunded.

DO YOU HAVE AN ISSUE OR TOPIC YOU WANT ADDRESSED AT THE CSEA LIAISON MEETING?

Write it down and send it in with your registration. We will try to get it included on the agenda or provide you with the appropriate contact information so you are able to follow up on the issue.

OFFICE USE ONLY		
SACO	BATCH	\$

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

**November 12 and 13, 2007 at the Radisson Hotel San Jose Airport
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 2007 and help your clients plan for 2008 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 Info:

Register by 8/31 - \$288.00

Register between 9/1 and 10/12 - \$318.00

Register after 10/12 - \$338.00

Seminar Information: 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. 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

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 600 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 – Upon request, 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 the students with a free and excellent stand-alone tax research system that can be installed on their computer or directly accessed from the CD.