

UPCOMING PROGRAMS and EVENTS

DATE	PROGRAM / EVENT	CPE	SUBJECT	LOCATION
March 15	Dinner Meeting	1 hr	IRS Update	Phoenix Club of Anaheim
April 15	T.G.I.O. Party		Celebrate End of Tax Season!	Phoenix Club of Anaheim
May 4	Seminar	5 hrs	IRS E-File Roundtable	Phoenix Club of Anaheim
May 17	Dinner Meeting	1 hr	TBD	Phoenix Club of Anaheim
June 21	Dinner Meeting	2 hrs	Ethics	Phoenix Club of Anaheim
July 9 - Sept 10	Special Enrollment Exam Course (10 Saturdays)			PFF Bank in Tustin
July 19	Dinner Meeting	2 hrs	Pass Through Entities	Phoenix Club of Anaheim
November 17 & 18	2 Day Seminar	16 hrs	Fall Update Seminar	Phoenix Club of Anaheim



The Tax Experts

ADDRESS SERVICE REQUESTED

**Orange County Chapter
California Society of Enrolled Agents**

OCEA

The Tax Experts

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THE WEB!!!**
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*Members enrolled to practice before
the Internal Revenue Service*

OCEA

The Orange County ENROLLED AGENT

The Tax Experts

Editor: Dale Quelle, EA • 14340 Bolsa Chica Rd • Westminster, CA 92683-4868 • 714-899-2221 www.eaoc.org

Volume 2004-2005 Issue 9
MARCH, 2005

1 HOUR CPE PROGRAM (CTEC Approved)

**QUICKIES
from the
QUILL**

T.G.I.O. PARTY! APRIL 15TH
At 5:00pm, lock the door and head
for the Phoenix Club! Meet, greet
and commiserate with your peers
and UNWIND! (See page 3)

SCHOLARSHIPS are available for
applicants who wish to further their
education in the tax profession.
Contact Cathy Patel, EA
taxmatters@sbcglobal.net

AGENDA March 15th, '05

4:30 Board Meeting
5:30 Social Time
6:00 Dinner Hour
7:00 CPE Program

Meeting Location

Phoenix Club
1340 Sanderson Ave, Anaheim
(57 Freeway to Ball Rd exit, then
EAST to Phoenix Club Dr, turn
RIGHT to Sanderson Ave)

*Wear your name badge and be
recognized.*

IRS Taxpayer Advocate Update

*Presented by
Connie Adams, IRS*

Connie Adams is head of the IRS' Taxpayer Advocates Office in Laguna Niguel, California.

Connie will be sharing her report to Congress covering AMT, tax withholding on non-wage workers as well as oversight and compliance of Federal Tax Return Preparers. These are issues we need to stay on top of to better serve our clients.

DINNER MENU

- Corned Beef & Cabbage
- Salmon in Dill Sauce
- Red Parslied Potatoes
- Rice Pilaf
- Green Beans Almondine
- Artichoke Hearts & Tomato Wedges
- Three Bean Salad
- Ambrosia Salad
- Fruit Tarts
- Carrot Cake
- Coffee, Decaf, Hot & Iced Tea

ALL YOU CAN EAT BUFFET

\$30 for pre-registration before 4:00 P.M. on the Friday prior to the dinner meeting; \$35 for on-site registration.

Phone registration to Peggy Ligori, EA at 951-325-8877 or email reservation@eaoc.org (please include your EA number). Peggy will be using last years permanent list for this year, too. If you want to be added to the permanent list, or deleted from it, please contact Peggy.



PRESIDENT'S MESSAGE

by Bill Geideman, EA



Bill Geideman, EA

The March dinner meeting will feature our traditional program by the IRS. Connie Adams, the head of the Taxpayer Advocate office in Laguna Niguel will be on hand to discuss the annual report by the national taxpayer advocate. Come and hear the latest on AMT resolution, registration of ALL tax preparers and other topics.

Our education chair, Patty Kappen, EA, seeks input from all members on what kind of education programs would interest you. Her phone number and E-mail address are listed in the directors section of this newsletter. The next major event is the E-file Roundtable which will be held at the Phoenix Club on May 4. This event provides 5 hours of CPE and allows practitioners to discuss any E-file questions with both IRS and FTB representatives.

Elsewhere in this newsletter are the names selected by the nominating committee for the officers and directors for next year. The election will be held at the regular May meeting and we have seven names to pick among for five directors. I want to thank the nominating committee for their usual outstanding effort.

If you haven't visited our website lately, I encourage you to go there at www.eaoc.org. Neal Gallaway, EA has done a fantastic job in upgrading and improving the site. Your comments and any suggestions are welcomed by Neal.

Tax season will soon be coming to another end. The time has come to let down your hair, toss off the tie, and join your compatriots for a *Thank God It's Over* party. This year's party will be at the Phoenix Club on Friday, April 15. We will have hors d'oeuvres starting at 5 PM and a buffet starting at 6:30. The food will be available for one and a half hours. We will have music and dancing until at least 9 PM. The beer, wine and soft drinks are on the house. So, shut your office, tell the last minute filers to file for an extension and hurry to Anaheim for the celebration.

~ Bill

TAX TEASER by Dale Larsen, EA

Mr. Hardwood has an adjusted gross income of \$50,000. In 2003, he donated capital gain property valued at \$25,000 to his church and did not choose to reduce the fair market value of the property by the amount that would have been long-term capital gain if he had sold it. His basis in the property was \$20,000. In addition, he made the following contributions:

\$500 to upgrade the city public park; \$1,000 to the Hill City Chamber of Commerce; \$5,000 to a charitable organization in Germany.

Compute Mr. Hardwood's deduction for charitable contributions in the current year (without regard to any carry over or carry back amounts).

- A. \$25,000
- B. \$31,500
- C. \$16,500
- D. \$15,500

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AVAILABLE OFFICE SPACE in Irvine. Airport area windowed office in Koll Center mid-rise building. 11' by 16' plus shared secretarial area and kitchen with 3 EA's and CPA's. Furnished or unfurnished \$600 per month. 18401 Von Karman #260. Call Rich Quarterman, EA at (949) 261-2111.

OCEA MEMBERS Have questions regarding bankruptcy, business formations or business litigation? Call a certified specialist in personal and small business bankruptcy with 24 years of experience practicing law in Orange County. Call Rick Barnett, Barnett & Rubin (AV rated), 949-261-9700 or rick@brlawyers.com

OFFICE SPACE AVAILABLE - Laguna Hills Located in Hillside Plaza, a mid-rise building. 10' x 16' office. Share reception, secretarial and kitchen area with 4 EA's. \$580/month. 23161 Mill Creek Drive, Suite 350. Call Dale Lankford, EA @ (949) 768-8336

OFFICE SPACE AVAILABLE - ANAHEIM Located within a two-story professional CPA office. Shared reception, kitchen area, conference Room. Internet access. \$350/month. Call Lee Akin, EA (714) 491-9500 Strayer Saylor and Associates, Inc.

IRS COLLECTION PROBLEM? Got a client with an IRS collection problem? Call Carl! OCEA member, retired IRS Revenue Officer. Phone/fax 949-589-1137, E-mail Carl Carter at buick61guy@aol.com preferred.

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SLATE of OFFICERS and DIRECTORS for 2005-2006

OCEA's Nominating Committee submits the following slate of Officers and Directors for the Orange County Chapter of Enrolled Agents for the 2005/2006 year. Nominations will be opened from the floor at our May meeting.

PRESIDENT: Lisa Newton, EA

1st VICE PRESIDENT: Peggy Ligori, EA

2nd VICE PRESIDENT: Cathy Patel, EA

SECRETARY: Dan Carlberg, EA

TREASURER: Patty Kappen, EA

CSEA CHAPTER DIRECTOR: Dona Evans, EA

DIRECTOR (choose 5): Ron Lay, EA Neal Gallaway, EA

Debbie Harris, EA Ken Nolan, EA

Coleman Cook, EA Jack Allen, EA Meg Shields, EA





COME ONE...
COME ALL...

CELEBRATE
the end of
tax season!

T.G.I.O.* PARTY
(*Thank God It's Over!)

APRIL 15th from 5pm
Phoenix Club of Anaheim

WELCOME NEW MEMBERS



- Howard Hinckley, EA
- Scott Anderson

APRIL 15th • from 5:00p.m.
Close the doors...CELEBRATE!

T.G.I.O.*
PARTY
***Thank God It's Over!!!**

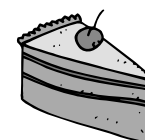


ENJOY FOOD, FUN, FRIENDS!

The T.G.I.O. Party is open to all tax practitioners, EAs and CTEC alike. Bring your staff, family, etc., to this celebration of the **END OF TAX SEASON!**

- Free Beer, Wine & Soft Drinks
- Hors d'oeuvres - 5:00 to 6:30pm
- Dinner Buffet - 6:30 to 8:00pm
- Commiserate with Your Peers!
- D.J., Music & Dancing - 6:00 to 9:00pm

\$30 per person • Kids 12 & under FREE!



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For more information, call Bill Geideman at (714) 669-0453