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The Tax Experts



Orange County Chapter  
California Society of Enrolled Agents

## UPCOMING PROGRAMS and EVENTS

DATE	PROGRAM / EVENT	CPE	SUBJECT	LOCATION
April 17	T.G.I.O. Party		Starts at 5:00PM	Phoenix Club of Anaheim
May	All Day Seminar		IRS E-File Roundtable	Phoenix Club of Anaheim
May 16	Dinner Meeting	1 hr	Dementia: Aging & Taxes	Phoenix Club of Anaheim
June 20	Dinner Meeting	2 hrs	Ethics	Phoenix Club of Anaheim
June 27 & 28			OCEA Planning Retreat	Queen Mary, Long Beach
July 18	Dinner Meeting	1 hr	The "Less Paper" Office	Phoenix Club of Anaheim



The Tax Experts



# The Orange County ENROLLED AGENT



The Tax Experts

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www.eaoc.org

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APRIL, 2006



QUICKIES  
from the QUILL

CELEBRATE! Join your fellow tax professionals to celebrate the end of another tax season at the annual T.G.I.O. party. 5pm at the Phoenix Club..

OCEA NEEDS MEMBER SUPPORT at the 2006 Planning Retreat, June 26-27, aboard the Queen Mary in Long Beach. See page 3 for details and reservation information.

## T.G.I.O. PARTY Friday, April 17th

5:00-6:30 Social Time  
Hors d'oeuvres  
6:30-8:00 Dinner Hour  
6:00-9:00 DJ, Dancing

Wear your name badge and be recognized!

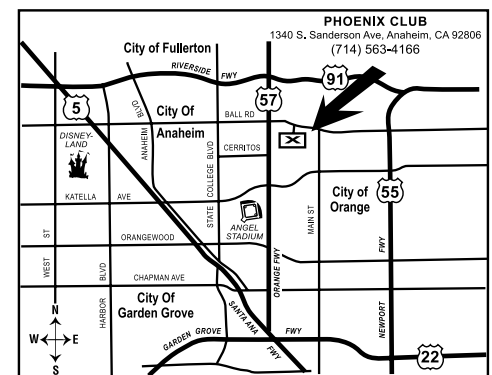
**APRIL 17th • from 5:00pm**  
**Close the doors...CELEBRATE!**  
**T.G.I.O.\***  
**PARTY**  
**\*Thank God It's Over!!!**

**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 to 9pm

**PARTY LOCATION**  
**THE PHOENIX CLUB**  
1340 Sanderson Avenue  
Anaheim

**ALL YOU CAN EAT  
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DIRECTIONS: Ball Rd Exit from 57 Fwy; Go East to Phoenix Club Dr; Turn South on Phoenix Club Dr; Turn Right on Sanderson Ave.



# PRESIDENT’S MESSAGE

by Lisa Newton, EA



We are nearing the end and many of you are heaving a large sigh of relief. Please come and join us at the TGIO Party on April 17th as a good time will be had by all! It will start with cocktails and hors d’oeuvres at 5:00. We’ll eat a little, drink a little and dance a little. Bring your family, bring your staff. Bring your best stories of the filing season.

Coming up on May 2, 2006 is our E-File Roundtable at the Phoenix Club. This is the best deal out there for 6 hours of CPE and to get your filing season questions answered.

Also coming up in May is the election of our officers for the new board, so plan on attending the May dinner meeting.

Before you know it summer will be here, but before you plan a summer vacation think about attending the OCEA planning retreat. It will take place June 26th and 27th at the Queen Mary in Long Beach. At the retreat we will plan the education opportunities and the events of the coming year. New ideas are always welcome. If you know a good speaker or a good topic for a dinner or longer education event, bring your ideas with you. If you cannot attend, send your ideas with someone who can attend. We are the largest chapter in CSEA by numbers, but we only stay strong with the assistance of our members and volunteers. Besides, it’s the Queen Mary, and the room is paid by the chapter as long as you attend the meetings!

I hope to see you at the upcoming events.

~ Lisa



**DON'T MISS THE**

**OCEA PLANNING RETREAT**

**JUNE 26-27, 2006**

*aboard the Queen Mary (see page 3)* →

## TAX TEASER by Dale Larsen, EA

Mark owned 100% of the stock in Gathers Corporation. In 2004, Gathers Corporation sold a computer with an adjusted basis of \$5,000 and a fair market value of \$8,000 to Mark’s Uncle Seth for \$4,000. What is the amount of Gathers Corporation deductible loss on the sale of this computer in 2004?

- A. \$(4,000)    B. \$(3,000)    C. \$(1,000)    D. \$(0)

ANSWER: C

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800-797-1410



The Tax Experts

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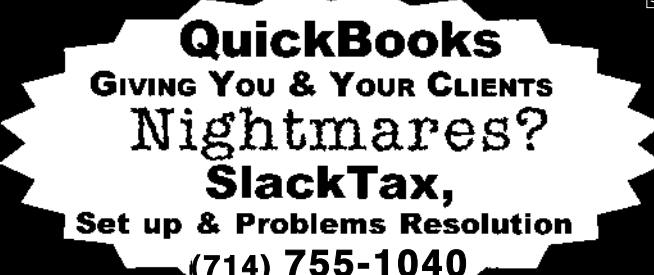


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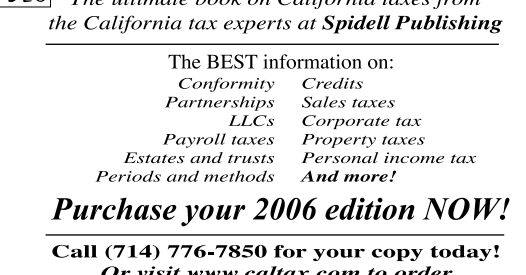
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## SLATE of OFFICERS and DIRECTORS for 2006-2007

OCEA's Nominating Committee submits the following slate of Officers and Directors for the Orange County Chapter of Enrolled Agents for the 2006/2007 year. Nominations will be opened from the floor at our May meeting.

PRESIDENT: Peggy Ligori, EA  
1st VICE PRESIDENT: Catherine Patel, EA  
2nd VICE PRESIDENT: Debbie Harris, EA  
SECRETARY: Neal Gallaway, EA  
TREASURER: Patty Kappen, EA  
CSEA CHAPTER DIRECTOR: Joni Terens, EA  
  
DIRECTORS: Jack Allen, EA Patricia Yeckel, EA  
Kenneth Noland, EA Donna Miller, EA Bill Stewart, EA

## The CLASSIFIEDS

EA TAX ACC'T in Long Beach needs office assistants on full time/part time basis. Entry level positions avail. Prior tax or accounting office experience is preferred. Must have strong organizational skills. Call Jim Clark, EA at (562) 248-0500.

HELP WANTED Assistant in financial svcs office in Orange to do gen'l office work, marketing, tax preparation. May also involve securities, real estate. Must have computer skills & aptitude to learn taxes. Will train. Leonard Wyss, EA (714) 974-7623.

WANTED EXPERIENCED TAX PREPARER Knowledge of Lacerte software is helpful. Please call Sam Milazzo of State Business Service at (562) 869-4819 or at (714) 962-8408. Fax (562) 869-7529. Ad placed by OCEA member Donna Miller, EA.

TAX PRACTICE AVAILABLE FOR SALE Seeking the right person (preferably an EA) to purchase my tax practice after the completion of next tax filing season. I am retiring due to declining health but will participate in the orderly transition with the purchaser. Practice consists of 85% tax preparation, 10% write-up and 5% audit and collection representation. My practice was established in Fullerton in 1988, now consists of approx 200 clients. I would like purchaser to maintain the business in the same general area. Price, terms are negotiable. Call Clem St. Louis at (714) 879-7511 or fax (714) 871-4446.

EXPERIENCED EA/Tax Preparer position in Fountain Valley. Lacerte proficiency a must. QuickBooks savvy a plus. Fax resume to Tom Bass, EA at (714) 241-0189 or email [tax@accountablesolutions.biz](mailto:tax@accountablesolutions.biz).

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](mailto:buick61guy@aol.com) preferred.

TAX PROFESSIONALS NEEDED TaxResources, Inc. is hiring tax professionals for the 2006 tax season! Positions are available at our Orange County and Sacramento locations. Flexible hours, earn great pay. Find out more about our company and job opportunities, and apply online at [jobs.taxaudit.com](http://jobs.taxaudit.com). OCEA member Dave DuVal.

COSTA MESA ENROLLED AGENT firm needs an experienced Enrolled Agent/Tax Preparer. The practice involves preparation of individual, corporate, partnership and fiduciary returns. Experience with Lacerte software and some accounting background is desirable. Salary commensurate with experience. E-mail resume with salary history to [resume@taxpros.info](mailto:resume@taxpros.info). Ad placed by OCEA member Craig Smith, EA.

HELP WANTED. Need EA for year-round position in Brea tax office. Experience in all aspects of tax preparation including estate tax and IRS audit/appeals representation is desired. Candidate should have good communication skills and be proficient with Lacerte, Excel and Quickbooks software. Fax resume to Patrick Hurley, EA @ (714) 996-1582.

.....  
*PLEASE NOTE: Classifieds are available for OCEA members & associates to advertise items for sale or rent, want ads and employment opportunities. Ads run for 2 consecutive months free of charge (longer based on space available. Let us know when your ad is no longer needed). Email to [4quelle@msn.com](mailto:4quelle@msn.com) or FAX to 714-899-2224. Be sure to include your name and phone number or email.*

## WELCOME NEW MEMBERS!

- Lee Akin EA
- Terry Peck EA
- Dennis Shedd EA
- Jack Smith EA
- Christy Snow EA
- Andrew Carroll
- Colette Cox
- Carmen Leone
- Maria Mello
- Bich Nguyen



*The Windsor Salon*

# OCEA PLANNING RETREAT

**JUNE 26-27, 2006**

*on board the Queen Mary in Long Beach*

**THE OCEA ANNUAL PLANNING RETREAT** is where your chapter's upcoming events and programs are considered. ALL OCEA members are invited to attend and volunteer for committee work.

If you enjoy the water and boats, you will want to attend the OCEA Annual Retreat this year. The meeting starts at 9:00 A.M. on Monday, June 26th, and will end mid-day on the 27th.

All OCEA Members are invited to attend, and to help develop next fiscal year's events and programs. You can make a real difference in OCEA by joining a committee, and in making your voice heard!

The sleeping rooms are refurbished First Class, and are quite comfortable. Meals will be served in water-view restaurants. Monday night our incoming President invites everyone attending to join at the nearby Shoreline Yacht Club for a fabulous dinner (prime rib, fish, or chicken) over-looking the marina from the clubhouse deck. There will be hors d'oeuvres, and a cash bar with all your favorite refreshments.



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*The Queen Mary by day*

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