

The Orange County ENROLLED AGENT

The Tax Professionals

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

Volume 2007-2008 Issue 6 December 2007

Welcome New Members

Michael Bradley
Paul Gregerson, EA
Takaaki Minami, EA
Daniel Phillips, EA
Ronald Schlegel, EA



December 18, 2007 dinner menu

Carved Prime Rib of Beef
Chef's Choice Fish
Whipped Potatoes
Sweet Corn
Three Assorted Salads
Two Assorted Desserts

The Mission of OCEA is to encourage professionalism, personal growth, and educational growth, while providing member benefits and enhancing the role of Enrolled Agents among the local governmental agencies, other professionals, and the general public.

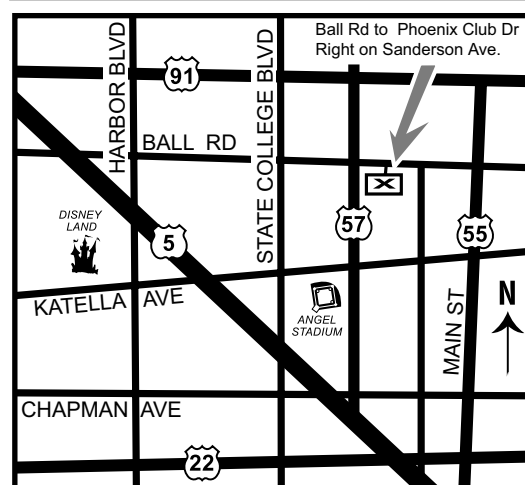
OCEA is 411 members strong and proud to be the largest Chapter of CSEA.

Dec 18th Program

IRS Stakeholder Liaison



Dan Breece is the primary contact point with IRS Stakeholder Liaison (S/L) and OCEA. He will be at our December dinner meeting with the most updated PowerPoint presentation concerning what he is working on and involved with in S/L. He is looking forward to interacting with us and updating us on his work. He is anxious to have us be as informed as possible and has a lot to share. Please come and see what is going on at the IRS that can help us help our clients.



Meetings are held at the Phoenix Club
1340 S Sanderson Ave, Anaheim, CA 92806

Agenda Dec 18th
4:30 Board Meeting
5:30 Social Time
6:00 Dinner Hour
7:00 CPE Program

\$35 for Member pre-registration before 4:00 P.M. on the Friday prior to the dinner meeting; \$40 for on-site registration and for non-members for meetings with 1 hour of CPE credit. Meetings with 2 hours of CPE credit are \$40 and \$45 respectively. Telephone reservations to Dan Carlberg at 714.774.8129 or email reservation@eaoc.org (please include your EA number). If you wish to be added to or deleted from the Permanent List, please contact Dan.

PRESIDENT'S MESSAGE

by Cathy Patel, EA, MBA

I hope this holiday season finds all happy & healthy with their homes undamaged by fire, flood, mudslide, earthquake or any other catastrophe! Our family had members who had to evacuate but their homes, horses, dogs, cats, sheep, rabbits, doves, fish, chickens, and peacocks were saved!!! Thanks to all those who made that happen!!!

OCEA supports the Women's Transitional Living Center located in Fullerton and several other locations in Orange County. In July & December we collect donated items of food, clothing, canned goods, dry good, cereals, cash, and checks. Floyd Allen donates his time to deliver these tax-deductible items to WTLC. We hope OCEA will again be generous in helping women and children, who are victims of abusive relationships and have no where else to turn for help, get a new start by bringing whatever you would like to donate to our December Board Meeting.

Upcoming events . . .

Practitioner Seminar presented by the Internal Revenue Service, the Franchise Tax Board, and California Society of Enrolled Agents on January 11 at the Hilton Hotel in Irvine. Come and hear directly from IRS and FTB personnel about updates and how to deal effectively with processing, procedures, and services. Contact is Joni Terens. Registration forms will be at the next Board meeting and will be emailed to each member.

Tax Software class presented by OCEA on January 15 before our dinner meeting at The Phoenix Club. Solving tax software issues will be Dan Carlberg & Ken Noland (ATX), Peggy Ligor & Marilyn Ratliff (Lacerte), Bill Geideman & Al Shifberg Mencher (Tax Works), Marcia Davis (CFS products), and Lisa Newton (QuickBooks). If you ever wondered if your tax software program could do something more efficiently or could do things you had yet to discover, come join us to find out — and bring your shortcuts or tips and tricks. If we like, we could form user groups for whatever of these products Members are interested in, maybe meeting before the Board meetings. Let us know what you think. Contact is Lisa Newton.

As tax season progresses, if a situation arises and you would like to know how other tax professionals handle it, save those questions for our "Stump the Panel" seminar on June 17 before our dinner meeting at The Phoenix Club. Volunteers agreeing to be on the hot seat are Lisa Newton, Peggy Ligor, Bill Geideman, Marilyn Ratliff, Dona Evans, Peggy Ligor, Russell Fox, Norm Schmidt, Yvonne Kirkendall, and David Shashoua. Submit questions by email — as they arise — to Lisa Newton at lisa@eanevton.com.

After Ken Noland sent out an email to our Members regarding OCEAs Members Helping Members, we had one request for help and two of our Members responded. If you find yourself needing emergency help to get those returns out, feel free to contact Ken and ask for help.

And that about does it for this month. I'll leave you with this thought . . .

Giving Thanks

Author Unknown

For the hay and the corn and the wheat that is reaped,
For the labor well done, and the barns that are heaped,
For the sun and the dew and the sweet honeycomb,
For the rose and the song and the harvest brought home.
Thanksgiving! Thanksgiving!
For the trade and the skill and the wealth in our land,
For the cunning and strength of the workingman's hand,
For the good that our artists and poets have taught,
For the friendship that hope and affection have brought.
Thanksgiving! Thanksgiving!
For the homes that with purest intention are blest,
For the season of plenty and well-deserved rest,
For our country extending from sea unto sea;
The land that is known as the "Land of the Free."
Thanksgiving! Thanksgiving!



Cathy

Happy Holidays . .



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ORANGE COUNTY CHAPTER OF THE CA SOCIETY OF ENROLLED AGENTS
PRESENTS A TWO HOUR SEMINAR FOR YOUR CONSIDERATION

SOLVING TAX SOFTWARE ISSUES

JAN. 15, 2008

at THE PHOENIX CLUB
1340 Sanderson Ave., Anaheim, CA

Registration from 1:30 P.M. to 2 P.M. Seminar from 2 P.M. to 4 P.M.
COST: \$50 IF REGISTERED AND PAID BY JAN. 4, 2007; \$55 THEREAFTER.

SPEAKERS & SOFTWARE:

DAN CARLBERG, EA & KEN NOLAND, EA on ATX

MARCIA DAVIS, EA on CFS PRODUCTS

PEGGY LIGORI, EA, MARILYN RATLIFF, EA & JONI TERENS, EA
LISA NEWTON, EA on QUICKBOOKS **on LACERTE**

BILL GEIDEMAN, EA & AL SHIFBERG-MENCHER, EA on TAXWORKS

Detach and return

Detach and return

REGISTRATION

☐ **Yes**, I want to attend the seminar:

Enclosed is my check/credit card information.

NAME: _____ ADDRESS: _____

CITY, STATE, ZIP: _____


TOTAL ENCLOSED\$ _____ DAYTIME PHONE: _____

EA, CPA, CTEC NUMBER E-MAIL: _____

PROBLEM YOU WOULD LIKE SOLVED.....

YOU MAY SUBMIT ADDITIONAL PROBLEMS ON A SEPARATE SHEET

MAKE YOUR CHECK PAYABLE TO Orange County Society of Enrolled Agents OR Charge to your credit card.

☐  ☐  ☐  No. _____ Expiration Date: _____

Three digit security code: _____ Signature: _____

MAIL REGISTRATION FORM TO: Lisa Newton, 1901 E Lambert Rd., #103, La Habra, CA 90631

Questions? Please call: Lisa Newton (562) 267-0351 • Fax: (562) 267-0353

You may photocopy this form for additional attendees.

It is OCEA's policy not to issue refunds once a registrant has registered for an event or class. However, a written refund request can be submitted to OCEA's treasurer by the next board meeting for consideration by the board in the following three cases: (1) Cancellation at least 72 hours before the event, or (2) a medical emergency preventing the registrant from attending the event, or (3) a death in the family.

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CHRISTMAS IN JULY & DECEMBER

by Floyd Allen, EA



The campaign named "Christmas in July" started at a Fullerton Savings and Loan office in the early 1990's when customers asked where they could donate their excess stuff to a worthy charity. The resulting carloads of usable items were delivered to the Women's Transitional Living Center (WTLC) with the slogan "Christmas in July". The idea caught on and numerous organizations, including OCEA, supported the activity both

in July and December with donations of food, clothing, canned goods, dry goods, cereals, cash and checks.

The WTLC is a 501(c) (3) organization providing short term help to women and their children who are victims of abusive relationships and have no where else to turn for help. The WTLC is supported by company and public donations to carry on their program at several locations in Orange County and provide a much needed chance for a new start for the victim and her children.

OCEA members have donated generously in past years and we are requesting your participation again at the December meeting by bringing canned goods, cereals, dry and paper goods, toys, clothing in good condition, bedding, house wares, and cash or checks.

Your donation is deductible to the fullest extent of the law...PLEASE BE GENEROUS AND BRING YOUR MUCH NEEDED DONATION TO THE DECEMBER 18th DINNER MEETING.

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Practitioner Seminar

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Palomar / San Diego Chapters (CTEC #1001-CE-3029)

Orange County Chapter (CTEC #1001-CE-3031)

San Fernando Valley Chapter (CTEC #1001-CE-3028)

Inland Empire Chapter (CTEC #1001-CE-3030)

Channel Islands Chapter (CTEC #1001-CE-3032)

You are invited to a unique opportunity for practitioners to hear directly from IRS and FTB personnel about updates and how to deal effectively with processing, procedures and services. This is a great opportunity to get firsthand information from the experts.

Registration: 7 a.m. to 8 a.m.

Seminar: 8 a.m. to 4:00 p.m.

Continuing Education Credit for EA's, CPA's, attorneys and CTEC. The above chapters of CSEA will issue certificates and CSEA maintains record of attendance. PROGRAM WILL PROVIDE UP TO 7 HOURS OF CONTINUING EDUCATIONAL CREDITS (6 hrs Federal and 1 hr CA)

Contact Joni Terens, EA 714-832-4633 or Joni@abt-tax.com with any questions

REGISTRATION INSTRUCTIONS:

1. Complete the registration form below indicating your first, second and third choice. If your first choice is unavailable you will be notified which location is available. Keep the section with the addresses.
2. Seminar cost \$115 (*Requests postmarked after Nov 30, 2007 and walk-in registration, IF AVAILABLE, will be charged \$130.00*). Send check made payable to "CSEA" with the attached registration form to the address listed below for the location of your first choice. Mail ONE registration form for EACH registrant (you may copy this form).
3. PLEASE NOTE: No refunds or change of location (unless unavailable). Your cancelled check is your confirmation. (No other confirmation will be sent.)

Jan. 7, 2008 CULVER CITY Radisson Hotel 6161 W. Centinela Ave Location #1	Jan. 8, 2008 BURBANK Pickwick Gardens 1001 Riverside Dr. Location #2	Jan. 9, 2008 ESCONDIDO CA Center for the Arts 340 N. Escondido Blvd Location #3	Jan. 10, 2008 SAN BERNARDINO Hilton Hotel 285 E. Hospitality Ln. Location #4	Jan. 11, 2008 IRVINE Hilton Hotel 18800 MacArthur Blvd Location #5 (add'l parking at Atsum Hotel)	Jan. 12, 2008 SANTA BARBARA Holiday Inn 5550 Calle Real, Goleta Location #6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check payable to: CSEA Mail check to: Andy Stamatis, EA 1215 Crenshaw Blvd. Torrance, CA 90501	Check payable to: CSEA Mail check to: Ulrike Edwards, EA 62279 Rands Avenue Woodland Hills, CA 91367	Check payable to: CSEA Mail check to: Sue Reed, EA 1102 S. Main Fallbrook, CA 92028	Check payable to: CSEA Mail check to: Stephen Davis, EA 6861 Inland Ave., #101 Riverside, CA 92506	Check payable to: CSEA Mail check to: Joni Terens, EA 17632 Irvine Blvd, #150 Tustin, CA 92780-3100	Check payable to: CSEA Mail check to: Candy Seaton, EA 270 North Rd, Ste 13 Goleta, CA 93117-5909

Practitioner Seminar Check payable to: CSEA Please check if you wish a vegetarian lunch: ☐

YOUR NAME _____

ADDRESS _____ CITY _____ ZIP _____

DAYTIME PHONE () _____ FAX () _____

E-MAIL _____ EA, CPA or CTEC Number _____

Please indicate location # ____ (1st choice) # ____ (2nd Choice) # ____ (3rd choice)

____ \$ 115 before November 30th ____ \$130 after November 30th

OCEA Disaster Committee Chair
Many of you probably had someone in your family, friends, or clients involved in the recent fires. How many of them were prepared? CSEA has a disaster plan at csea.org. Everyone needs to plan ahead so that you are ready for any emergency.

Disaster Preparedness Tips

By Dona Evans, EA

DO Not relight your own pilot lights. Call the utility company.
17. Secure water heaters and appliances that could move enough to rupture utility lines.
18. Secure heavy, tall furniture that can topple.

Here are some helpful tips.

1. Make sure you have a specific plan for your home and office.
 2. Set up a "buddy" system at work and home.
 3. Have an out of the area contact that has a list of family, friends, and others to call for you.
 4. Check with police and fire departments to see if there is a local program to register elderly and disabled residents.
 5. Be sure to know the emergency plan for your children's schools and your employees' children's schools.
 6. Take videos and/or still pictures of your home and office. Do an inventory and keep copies in several locations.
 7. Make two sets of back-up tapes of your business records.
 8. Keep a copy of your client list. This satisfies federal client information retention requirements.
 9. Record serial numbers of assets and for business keep a copy of depreciation worksheets.
 10. Build a disaster supply kit for your home and car. The OES recommends packing enough essential items for 72 hours. A list of essentials can be downloaded from www.oes.com.
 11. Don't forget those with special needs such as: medication, doctors numbers, etc.
 12. Learn first aid and CPR.
 13. Eliminate hazards in your home and workplace.
 14. Know the safe spots in each room: under sturdy tables, desks, or against inside walls.
 15. Know the danger spots: windows, mirrors, hanging objects, fireplaces, and tall unsecured furniture.
 16. Learn how to shut off the gas, water, and electricity.
 19. Secure large appliances on wheels.
 20. Secure hanging plants and heavy picture frames or mirrors.
 21. Put latches on cabinet doors to keep them closed.
 22. Keep flammable or hazardous liquids in cabinet or secured on lower shelves.
 23. Maintain emergency food, water and other supplies, including a flashlight, a portable battery-operated radio, extra batteries, fire extinguisher, tools (especially a pipe wrench and crescent wrench), prescription medicines, first aid kit, cold medicine, basic pain relief medicine, spare clothing, street maps of your area, and blankets at home and office.
 24. Other items that should be in your emergency kits include toothbrushes, toothpaste, soap, a list of current prescriptions, pet food, warm socks, and zip-lock bags. Add to your list and keep it current.
 25. Have an evacuation box which includes: Copies of the first two pages and important attachments of the past four-years tax returns. For business returns keep all necessary documents. Final closing escrow papers for purchase of home and properties. Important papers such as: birth certificates, citizenship papers, social security cards, green cards, or other personal documents. Copies of driver's licenses, car titles and registrations and insurance. List of current prescription medication. Negatives of all your important family photos. Copies of all insurance policies. Make a list of important phone numbers, investments, bank accounts, credit card numbers and other account numbers. Recent photograph, fingerprints and dental records.
 26. Make sure your children have a task to do so that they can keep calm.
 27. Make sure your pets are taken care of.
- Hopefully, none of you will ever be faced with a disaster but, at least you would be prepared.

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EA TAX-ACCOUNTANT in Long Beach has an immediate opening for an office assistant with strong organizational skills. Call Jim Clark, EA at (562) 248-0500 or email your resume or brief letter of qualifications to jimclark5@verizon.net.

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Seal Beach CPA firm seeks an experienced tax preparer for part-time work during tax season and as needed the rest of the year. Must be proficient in individual tax. Some experience with business tax is a plus. Lacerte experience req. Email resume: debbie@cpaadvisor.com; fax to (562) 431-5755.

Senior EA wanted in Brea for seasonal full time & flex time remainder of year. Proficient with Lacerte, QuickBooks, IRS audits & correspondence, & tax research. Fax resume to Patrick Hurley, EA at (714) 996-1582, email to taxinfo@equinetax.com.

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The Tax Professionals

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UPCOMING PROGRAMS & EVENTS

<u>DATE</u>	<u>PROGRAM / EVENT</u>	<u>CPE</u>	<u>SUBJECT</u>	<u>LOCATION</u>
December 18	Dinner Meeting	1	IRS Stakeholder Liaison	Phoenix Club
January 11, 08	Seminar	7	IRS/Practioner Seminar	Irvine Hilton
January 15, 08	Seminar	2	Tax Software Tricks & Tips	Phoenix Club
January 15, 08	Dinner Meeting	2	TaxBook/Quickfinder Tutorial	Phoenix Club
July 18, 2008	Seminar	4	IRS Collection Techniques	Phoenix Club