

CALIFORNIA SOCIETY OF ENROLLED AGENTS



San Diego Chapter Forum Newsletter November 2008 www.cseasandiego.org



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November 11, 2008 – Chapter Dinner Meeting

**Topic: Mortgage Interest Audits
Small Business Retirement Plans**

**Speaker: Patricia Feldman, IRS
Jackie Weitzberg**

This is the meeting we have all been waiting for. The first hour will have Patricia Feldman from the Internal Revenue Service discussing the new IRS audit program on Mortgage Interest. Come early and bring your questions. This promises to be eye opening for all of us. After dinner, Jackie will discuss the various Small Business Retirement Plans available to our business clients. She will go through the various plans and discuss in summary the various in's and out's with each respective plan.

Event Times and Topics:

4:00 – 5:00 Board of Directors Meeting
5:00 - 5:30 Registration
5:30 – 6:20 Seminar Begins
6:20 – 6:40 Networking
6:40 – 7:40 Dinner
7:40 – 8:30 Seminar wraps & and adjourn meeting

Reservations:

If you *are not* on our “Prepaid Reservation List”, call 800-642-1040 or send an e-mail to paulatax@san.rr.com before 5 p.m. the previous Thursday, which will be November 6, 2008, to make your reservation. If you are on our “Prepaid Reservation List”, you only need to call the phone line if you are CANCELLING. Your cooperation is greatly appreciated.

Menu Selection:

Garden Salad
Turkey Medallions – Roasted Turkey served with Apple Chutney and Whipped Chive Potatoes
Chef's Choice of Dessert

Cost:

\$27 for members and spouse with a timely reservation
\$33 for nonmembers with a timely reservation
\$37 for all late reservations and nonmembers.

Location:

The Handlery Hotel, 950 Hotel Circle North, Mission Valley. Phone (619) 298-0511.

President's Message – November 2008

Dear Chapter Members,

Now that all of us have survived the October 15th deadline, we are all heading into a few months of letting our "hair" down and smooth sailing, or so we would hope. Most likely your schedule looks a lot like mine, CE hour after CE hour. I think the first away I am going is Pecharanga for a business tax course. I am looking forward to that one, a legitimate reason to drag my feet and possibly get to play some poker. After all, the drive up and down the 15 will take forever and I just need to miss the traffic!

I hope everyone enjoyed last month's dinner meeting. I would like to thank CSTC – San Diego for allowing us to attend their meeting on the 16th. We made a decision as a Board that meeting on the 14th would not be a very good idea. I'm sure there was a lot of great information learned from Lynn Freer.

This month is probably the most anticipated dinner meeting we have had this year. I realize that the IRS revenue agent coming to speak to us only has an hour, but I have a feeling this hour is going to feel like 5 minutes. Remember, we do have another great topic, Small Business Retirement Plans. Our clients look to us to advise them on various issues, and having an understanding of all of the different options they have make you that much more valuable to your client. I believe as Enrolled Agents, we are GREAT TAX PROFESSIONALS. That doesn't just include preparing an accurate return, it also means providing timely client advice and assistance to allow them the best chances of paying the least amount of tax annually!! That is where WE, the ENROLLED AGENTS ADD VALUE!! Remember that when your client questions your fee, you ADD VALUE. Re-focus your efforts to being a well rounded tax professional and you will have many happy clients that will send you their friends and family.

See you on Tuesday, November 11th.

Steven C Leibold, EA
Chapter President

CSEA MISSION STATEMENT

The mission of the California Society of Enrolled Agents is to foster the professionalism, business development and personal growth of its Members, to protect the interests of the individual Members of the Society, and to enhance the awareness and role of the Enrolled Agent among members of the public, other professions and with governmental agencies.

CLASSIFIEDS

[Want to advertise office space, practices to buy, practices to sell, etc just send me an e-mail along with the copy that you want. We will place your ad in the newsletter AT NO COST!! What a great way to get your word out.](#)

OFFICE SPACE AVAILABLE - We have 2 rooms available 1 - 10 X 10 and 1 - 12 X 16 conference room. Each room includes a computer, internet access (our computer or yours), client seating and is professional looking. We are offering them by the hour (20 hours per month minimum; additional available for modified rent). Rent is \$250 per month for up to 20 hours of use. NO LONG TERM COMMITMENTS REQUIRED. You'll also receive 1 voice mail box, mail service, and T-1 internet. Copier (color & b/w)/fax/printer/secretarial services available at additional cost. Ideal for small practitioner that doesn't need full time office space, but wants some place professional to meet with their client. Call 619-294-4286 X351 or e-mail sleibold@sdbizadv.com to schedule a time to visit our office. Ask for Steven Leibold.

Committee Interests Questionnaire

In order for our San Diego Chapter of CSEA to function well and achieve the goals put forward by your Board of Directors, VOLUNTEERS ARE NEEDED!! Do you have a spare 1 or 2 hours per month to give to SD/CSEA? Each committee has various responsibilities and as with most committees, not all require the same amount of effort or time as others. However, any help you can offer is highly appreciated by your Board. Below are the committees we have. Please complete this questionnaire and either drop off at our dinner meeting, fax it to Steven Leibold (619-294-9908) or e-mail it to Steven Leibold (sleibold@sdbizadv.com). Your officers and Board Thank you for all of the help you can offer.

Steven C. Leibold, EA, Chapter President

- | | | |
|---------------------------------------|---|--|
| <input type="checkbox"/> Audit | <input type="checkbox"/> Budget & Finance | <input type="checkbox"/> Legislative |
| <input type="checkbox"/> Bylaws | <input type="checkbox"/> Education (Seminars) | <input type="checkbox"/> Education (Dinner Meeting Speakers) |
| <input type="checkbox"/> Membership | <input type="checkbox"/> Newsletter Editor | <input type="checkbox"/> Public Information Awareness |
| <input type="checkbox"/> Scholarships | <input type="checkbox"/> Disaster Services | <input type="checkbox"/> Nominating Committee |

Activities that we need assistance with:

- | | | |
|---|---|---|
| <input type="checkbox"/> CTEC Info Contact | <input type="checkbox"/> Website | <input type="checkbox"/> IRS/FTB/SBE Small Biz Workshop |
| <input type="checkbox"/> IRS Seminar | <input type="checkbox"/> Meeting Arrangements | <input type="checkbox"/> QuickFinders/The Tax Book |
| <input type="checkbox"/> Sunshine | <input type="checkbox"/> Yellow Pages | <input type="checkbox"/> Social Events |
| <input type="checkbox"/> Physical Property (storage shed) | | |

YOUR NAME: _____ Phone: _____

YOUR E-MAIL: _____

CSEA Audio Tax Seminars

Steve Sims, EA, FTB Taxpayer Advocate. is looking for any question or concerns about RDP and/or SSMC. He is presenting the CSEA October Audio Tax on this subject, and he wants to make it as valuable a presentation as possible. He would appreciate your thoughts and questions. You can email any responses directly to Sharon Stone Smith ([sstonesmith@csea.org](mailto:ssstonesmith@csea.org)). Thank you.

Want an easy hour of education from your own office? Sign up for the CSEA AUDIO TAX SEMINARS. Contact CSEA (800-777-2732) or visit their website at www.csea.org and click on EVENTS for more information.

All sessions are held the first Wednesday of each month at 11:00 am for one hour. The cost is \$50 for Members and \$75 for non-Members. The current schedule includes:

Date	Topic	Speaker
5-Nov	Non Profit Organizations	TBD
3-Dec	California Update (2 hours)	Vicki Mulak, EA
7-Jan	Federal Update (2 hours)	Bonnie DeSimone, EA

BE INVOLVED

Did you know that our monthly Board of Director Meetings are OPEN MEETINGS? That's right. You are welcome to sit in on our Board meetings and offer your opinion and views. We WANT TO HEAR FROM YOU! Please come join us at our next Board Meeting and GET INVOLVED! We'd love to see and hear from YOU!

IRS NEWS

Your friends at the IRS know taxes are the last thing business owners and the self-employed want to be thinking about, but the agency says it's trying to ease the pain.

A new “[Self-employed Individual’s Tax Center](#)” Web page is now available for business owners and the self-employed who file Schedule C with their Form 1040. It is a one-stop center for everything: News affecting small businesses, what qualifies as a business expense forms and publications, and online learning videos and publications.

Here’s another IRS offer to help you get up to speed on your federal tax responsibilities — and particularly for information about the Schedule C for reporting profit or loss from a business. The IRS has a new laminated bookmark for Publication 4667.

The bookmark has key search words to help find important tax information on the IRS Web site. And its FREE! To download it, [CLICK HERE](#).

To keep up with the latest tax news, you may want to start a free subscription to the IRS’s e-News for Small Business. To sign up, [CLICK HERE](#).

We need dinner topic ideas and speakers?

Do you have a fabulous idea for a speaker topic or know a great speaker? We are looking for some ideas on possible speaker topics as well as speakers to present the material. Perhaps you are a closet public speaker and would like to impress your CSEA friends? Don’t be shy. SPEAK UP!! Send an e-mail with either your ideas on possible topics or speakers you have heard in the past to Elaine Smith @ eztaxes@sbcglobal.net. We can always use a few good speakers.

Breakfast Meetings:

- **South Bay**, 8:00 a.m. every Tuesday at Stella’s On Third, 365 Third Ave, Chula Vista 91910, Chula Vista.
- **Business Entities Tax Group**, 7:30 a.m., at Coco’s Restaurant, 5550 Lake Murray Blvd., La Mesa. This group meets the 1st Thursday of each month, except April. Look for Jerry Dixon.
- **Fiduciary Tax Group**, 7:30 a.m., at Coco’s Restaurant, 5550 Lake Murray Blvd., La Mesa. This group meets the 2nd & 4th Thursday of each month, except April. Look for Jan Phillips, Sylvia Lang, or Val Daigle.
- **Individual Tax Group**, A 7:30 a.m., at Coco’s Restaurant, 5955 Balboa Ave in Clairemont Mesa. This group meets the 2nd and last Friday of each month, except April. Contact Val Daigle for more info (619-435-3131 or val@westax.com)

Upcoming Events In 2008

Date/Time	Event/Topic	Speaker(s)
May 13, 2008—5:30 pm	Chapter Dinner Meeting Head of Household & RAR Reports	Bonnie Hoyle, FTB Lorrie Lefevre, FTB
June 10, 2008—5:30 pm	Chapter Dinner Meeting Indian Taxation on and off the reservation, etc	Emily Williamson, IRS Scott Karafin, IRS Steve Sims, FTB
July 8, 2008—5:30 pm	Chapter Dinner Meeting Medi-Cal Planning Estate Planning w/Medi-Cal Reverse Mortgages	Carl Gehring, CSA David Barnier, Esq. Jerry Sleder
August 12, 2008—5:30 pm	Chapter Dinner Meeting Elective Disability Coverage P/r Taxes ID Theft & I-9's	Josie Munoz (EDD) Robert Burgess (INS Customs)
September 9, 2008—5:30 pm	Chapter Dinner Meeting 105 Plans for Small Businesses Small Business Benefits Plans	Matt Lorenz/Shawndi Filby Cynthia Paxton
September 29, 2008— National University	SEMINAR Balancing the Balance Sheet (2) S-Corp: S means Safe not Sorry (4) I just Bought/Sold a Business (2)	Vicki Mulak, EA
October 16, 2008—5:30 pm	Chapter Dinner Meeting— JOINT WITH CSTC California Tax Update	Lynn Freer (Spidells)
October 27, 2008— National University	SEMINAR Deductible or Not? Schedule C & E (4 hrs) Strategies to Avoid AMT (2) Foreclosures, Forms & Forgiveness: A Guide through Form 1099-A, 1099-C, and 982	Alice Orzechowski, CPA, EA Marilyn Meridith, EA
November 11, 2008 – 5:30 pm	Chapter Dinner Meeting Mortgage Interest Audits Small Business Retirement Plans	Patricia Feldman, IRS Jackie Weitzberg
November 18, 2008 – National University	SEMINAR Interviewing your Tax Clients with Circular 230 in Mind	Maddy Gaoiran, EA
December 9, 2008 – 5:30 pm	Chapter Dinner Meeting Selling Your Practice; Exit Planning Strategies	Leo Klijn
January 7, 2009	SEMINAR IRS Tax Forum	See IRS Flyers for more info
January 13, 2009 – 5:30 pm	Chapter Dinner Meeting Ethics	Connie Ferrell, EA CSEA President