

CALIFORNIA SOCIETY OF ENROLLED AGENTS



San Diego Chapter Forum Newsletter July 2009 www.cseasandiego.org



President:

Steven Leibold, EA
[619] 294-4286; Fax 294-9908
e-mail: Sleibold@sdbizadv.com

1st Vice-President:

Roger Garay, EA
[619] 445-5523; Fax 445-1421
e-mail: rogertax@ix.netcom.com

2nd Vice-President:

Paula Armstrong, EA
[858] 467-0547
e-mail: paulatax@san.rr.com

Secretary:

Christy Kohl, EA
e-mail: ckohltax@hughes.net

Treasurer:

Art Savage, EA
[619] 466-6181; Fax: 447-4067
e-mail: Asavagetaxsvc@cox.net

Directors:

Elaine Smith, EA
e-mail: eztaxes@sbcglobal.net

Lynne Fletcher, EA
e-mail: flechertax@cox.net

Darryl Hale, EA
e-mail: haled@hdvest.net

Nancy Rubinstein, EA
e-mail: nancy@nrm1.com

Betty Cabral, EA
e-mail: betty@taxandbusiness.org

Val Daigle, EA
e-mail: val@westax.com

Past President:
Thomas Carter, EA
e-mail: Tomcarter@sbcglobal.net

CSEA Director
Thomas Carter, EA
e-mail: tomcarter@sbcglobal.net

July 16, 2009 (THURSDAY) – Chapter Dinner Meeting

Topic: Divorce & Taxes

Speaker: Ginita Wall, EA

Tonight's topic will cover Divorce & Tax consequences. This meeting is our annual Joint meeting with the San Diego Chapter of CSTC. Don't forget, we will be meeting on THURSDAY, not our usual TUESDAY. This is a great time for both of our organizations to learn more about each other and have an opportunity to network with other tax professionals in the community.

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 July 9, 2009 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:

Caesar Salad
Sliced London Broil – Tender Marinated Flank Steak served with Cabernet Mushroom Sauce and Garlic Mashed 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 – July 2009

Dear Chapter Members,

Last month we put out our REQUEST FOR VOLUNTEERS and would like YOU to JOIN us either as a Board Member or a capable volunteer to help the committee members accomplish the business of CSEA San Diego. It DOES NOT require a significant time commitment and is personally rewarding for each and every volunteer. You can join us at any of our Board Meetings which occur at 4 pm the day of our regular dinner meetings.

Our annual RETREAT is scheduled at the Handlery Hotel on Tuesday, July 7th at 8:30 am to 2:00 pm. At this meeting we will plan out the upcoming fiscal year 2009/2010. You can also simply e-mail me sleibold@sdbizadv.com or Tom Carter tomcarter@sbcglobal.net and we will put you in touch with the appropriate committee member. Please come and support your local board and provide us your input on how we can better serve you.

Are you attending the Tax Forums schedule for July 14th & July 15th? If so, consider volunteering for an hour or two at the NAEA booth. We are looking for friendly faces to talk with future EA's as well as EA's that are not members of NAEA and CSEA to show the value of membership. All it takes is an hour or two to help. Please contact me at sleibold@sdbizadv.com if you are interested.

Roger and Elaine have put together an excellent education program for our local chapter. Some of the topics are our own Tax Update Seminar in December for 1 day (Federal & CA), a tax planning seminar that I will be presenting for half day and the other half filled by an excellent speaker presenting on the increase in IRS audits of real estate professionals/investors. We will also be doing another day of education on Foreclosures, short sales, and debt forgiveness. This is something that all of us are probably starting to see more and more in our practice. The dates are listed in the calendar so please MARK YOUR CALENDAR for the events you are interested in. Go to our website at www.cseasandiego.org and download the registration flyer. We are offering some great specials if you sign up by the early bird dates, so don't miss out.

I look forward to seeing everyone at the July 16th, 2009 meeting.

Steven C Leibold, EA
Chapter President

CSEA MISSION STATEMENT

The California Society of Enrolled Agents is a progressive, professional association dedicated to serving EA's in California and abroad, enabling them to grow, prosper, and lead as "THE" Tax Professionals while serving taxpayers in a dynamic, rapidly changing environment with integrity and trust.

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 ITEMS FOR SALE: 2 executive desk chairs (one light blue, one maroon) in good shape; Digital Projector with carrying case in good condition (works with Windows XP); 2 two-drawer file cabinets (one beige, other gray); Call Roger Bonfils 619-296-4546.

PART-TIME TAX/AUDIT WORK DESIRED: Experienced, semi-retired EA desires part time work from one to three days per week. Temporary work is OK. Call Roger Bonfils, EA at 619-296-4546.

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: _____

BOARD OF DIRECTORS – Fiscal Year 2009/2010

The following people have been voted on by the members in attendance at our last dinner meeting.

Steven C. Leibold, EA	President	Roger Garay, EA	1 st Vice President
Paula Armstrong, EA	2 nd Vice President	Christy Kohl, EA	Secretary
Art Savage, EA	Treasurer	Thomas Carter, EA	CSEA Director
Board of Directors			
Elaine Smith, EA	Lynne Fletcher, EA	Darryl Hale, EA	Nancy Rubinstein, EA
Betty Cabral, EA	Val Daigle, EA		

If you would like to get involved, please contact Tom Carter, EA at tomcarter@sbcglobal.net or Steven Leibold, EA at sleibold@sdbizadv.com

CSEA DigiTax Seminars

Want an easy hour of education from your own office? Sign up for the CSEA DIGITAX SEMINARS. Contact CSEA (800-777-2732) or visit their website at www.csea.org and click on EDUCATION AND 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
5/6/09	Surviving a Foreclosure	TBD
5/13/09	Everything you wanted to know about the EA Exam How to advise your client when they say "My loved one has died! What should I do?"	Eva Rosenberg, EA
6/3/09	How to close a CA Corporation	TBD
7/1/09	Hobby Loss	TBD
8/5/09	Tax Efficient Solutions to Appreciated Real Estate	TBD
9/2/09	Divorce & Taxes	TBD
10/7/09	Improved Communication Increase	TBD
11/4/09	Your Value (Ethics)	TBD
12/2/09	Research with the IRS	TBD
1/6/10	California Tax Update	TBD

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!

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 2009

Date/Time	Event/Topic	Speaker(s)
May 12, 2009 – 5:30 pm	Chapter Dinner Meeting Tax Tools, Schedule D Tools, and other Utility Programs	Marcia Davis, Tax Tools
June 9, 2009 – 5:30 pm	Chapter Dinner Meeting EDD Independent Contractor Audits Schedule C	Paula Armstrong, EA Cris Park, EA
July 16, 2009 – 5:30 pm	Chapter Dinner Meeting – Joint CSTC Divorce & Taxes	Ginita Wall, EA
July 29, 2009 National University 8 hrs	SEMINAR Foreclosures, Short Sales, & Forgiveness of Debt: A Guide Through Forms 1099-A, 1099- C, and 982	Lisa Ihm, EA
August 11, 2009 – 5:30 pm	Chapter Dinner Meeting California Tax Update	Lynn Freer, EA (Spidells)
August 17, 2009 National University 8 hours	SEMINAR Business Entity Selection, Tax Differences & Tax Planning Opportunities in this Emerging Political/Economic Environment IRS Audit Sweep on Real Estate Investors	Steven Leibold, EA Philip Garrett Panitz, LLM, JD
September 8, 2009 – 5:30 pm	Chapter Dinner Meeting – S Corp Basics, AAA Account basics, basis & at risk	David Woods, EA
October 13, 2009 – 5:30 pm	Chapter Dinner Meeting - Panel Discussion – Tax Season Problems	Your Fellow EA's – contact Elaine to be part of the panel
November 10, 2009 – 5:30 pm	Chapter Dinner Meeting Foreign Bank Accts, gifts, Hot IRS enforcement areas Foreclosures & Bankruptcy, Lien Stripping & other tax issues	Brian Lynn, JD, LLM Dave Britton, JD
December 8, 2009 – 5:30 pm	Chapter Dinner Meeting Year End QuickBooks Issues ENTERTAINMENT	Steven Leibold, EA
December 16, 2009 National University 8 hrs	SEMINAR 2009 Federal & California Tax Update	Vicki Mulak, EA Lisa Ihm, EA

January 12, 2010 – 5:30 pm

**Chapter Dinner Meeting
Ethics**

Claudia Hill, EA