

# CALIFORNIA SOCIETY OF ENROLLED AGENTS



## San Diego Chapter Forum Newsletter December 2009

[www.cseasandiego.org](http://www.cseasandiego.org)



### PRESIDENT'S MESSAGE

With Thanksgiving behind us and all of those poor turkeys consumed over a short period of time, we are starting the final month of the holiday season. December is a traditionally slow time of year for all of us unless you have your clients well trained on tax planning, then you are keeping quite busy with all of the different changes we have had over the year. Not to mention so many of our clients have had sizable decreases in their income, especially our self-employed clients.

This month our education will cover a variety of topics on QuickBooks as we get ready to move into tax season. We all know that most of our clients do not use the software properly, but having an understanding of QuickBooks will help you navigate through the file easier. Kathy Cazin and Terry Poletto will jointly present on this great year end topic. Our final hour will be some entertainment arranged by Cheryl Standard.

Have you signed up for our tax update course scheduled for December? Lisa Ihm, EA and Vicki Mulak, EA will be out speakers for this entertaining and information filled full day of tax update. Come earn those 8 hours on 12/16/09 at National University. Cost for attendance is now \$200 and you can visit [www.cseasandiego.org](http://www.cseasandiego.org) for the flyer and registration form.

We will continue with the drawings we started two months ago and go through January 2010. All you have to be is present to win. Your attendance will put a ticket in the drawing for either a \$25 VISA Gift card or \$25 gift certificate toward one of our Seminar's hosted by the San Diego Chapter of CSEA. The certificate toward the CE will be good for 12 months, so you can also use it next year. The only way to win though is to attend our dinner meetings. Don't miss out!!

We need some new volunteers to help with various aspects of running SD/CSEA. Please contact myself at [sleibold@sdbizadv.com](mailto:sleibold@sdbizadv.com) so we can discuss how you would like to help us out.

Remember for December and January our monthly dinner meeting will be at the Crown Plaza located at 2270 Hotel Circle North. The Handlery is being remodeled and they have moved us to another location for the time being. Don't forget!

Would you like to be on the Board of Directors or perhaps a Chapter Officer? If you are interested and would like to learn more about what is involved (it really isn't that much), then attend our Board Meeting on 12/08/09 at 4:00 pm at the Crown Plaza Hotel (before our dinner meeting) or call Steven Leibold, EA at 619-294-4286 to discuss your interest further. We are looking for a few NEW San Diego Chapter CSEA leaders!

All of you are welcome to join us at our monthly board meetings which start at 4 pm the day of the dinner meeting. The meetings are about 1 hour in length and we go over various topics regarding the operations of the local CSEA chapter. We are always looking for new board members and volunteers and this is a great way to GET INVOLVED! So come on by and say "Hi"!

I look forward to seeing everyone at the December 8<sup>th</sup>, 2009 meeting.

Steven C Leibold, EA Chapter President

### CHAPTER DINNER MEETING

- When:** December 8, 2009
- Speaker(s):** Katz Cazin and Terry Poletto
- Topic:** QuickBooks Client Review Tools, the Accountants Copy and the External Accountant User
- Speaker:** Mystery Man
- Topic:** Entertainment
- Where:** The Crowne Plaza  
2270 Hotel Circle North  
Mission Valley 92108  
(619) 297-1101  
Approximately half a mile west of the Handlery Hotel
- Times:**
- |             |                            |
|-------------|----------------------------|
| 4:00 – 5:00 | Board of Directors Meeting |
| 5:00 - 5:30 | Registration               |
| 5:30 – 6:20 | QuickBooks Presentation    |
| 6:20 – 7:20 | Dinner                     |
| 7:20 – 7:30 | Announcements              |
| 7:30 – 8:30 | Entertainment              |
| 8:30        | Meeting adjourns           |
- Cost:** \$30 each for member and spouse with a timely reservation  
\$36 for nonmembers with a timely reservation  
\$40 for all late reservations
- Reservations:** **Call (800) 642-1040** or send an e-mail to [paulatax@san.rr.com](mailto:paulatax@san.rr.com) before 5 p.m. the previous Thursday, which will be December 3, 2009 to make your reservation. PRE-PAID DINNER RESERVATIONS MUST CALL AND CANCEL IF NOT ATTENDING THE MEETING!
- Menu:** Hosted bar form 5 to 6:30, cash bar after 6:30  
Cheese tray with our cocktails  
Caesar salad  
New York steak served with mushrooms, mashed potatoes and seasonal vegetables  
Chocolate decadence for desert

## UPCOMING CHAPTER EVENTS

Date / Time	Event / Topic	Speaker(s)
12/08/2009 5:30 p.m.	QuickBooks Client Review Tools, the Accountants Copy and the External Accountant User	Kathy Cazin and Terry Poletto
	Entertainment	Mystery Man
12/16/2009 8:00 a.m. National University	2009 Update Seminar Federal California (8) hours	Vicki Mulak, EA and Lisa Ihm, EA
01/12/2010 5:30 p.m.	Dinner Meeting Ethics	Claudia Hill, EA

## BREAKFAST MEETINGS

**South Bay:** 8:00 a.m. every Tuesday at Stella's, 365 Third Ave, Chula Vista.

**Fiduciary Tax Group:** 7:30 a.m. on the 2<sup>nd</sup> and 4<sup>th</sup> Thursday of each month (except April) at Coco's Restaurant, 5550 Lake Murray Blvd, La Mesa.

**Individual Tax Group:** 7:30 a.m. on the 2<sup>nd</sup> and last Friday of each month (except April) at Coco's Restaurant, 5955 Balboa Ave, Clairemont Mesa.

## SD CHAPTER OFFICERS & DIRECTORS

### President:

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# San Diego Chapter CSEA 2009 Fall Seminar Lineup



**December 16, 2009 (Wed) - 8:00 am to 5:00 pm (8 Hrs)**

## **2009 Federal & California Tax Update**

**Early Bird Discount: Register by October 31, 2009 - \$120**

**November 1<sup>st</sup> through day of seminar - \$200**

**Extended Early  
Bird Deadline...**  
October 31<sup>st</sup>

### **Speaker: Vicki Mulak, EA, CFP®**

Vicki is an Enrolled Agent and a Certified Financial Planner® who has assisted both business owners and individuals for 19 years. In addition to her private practice, Vicki regularly speaks on California tax law and other business topics. Vicki is also an extended education instructor for Cal State University Fullerton's Financial Planning program. She is a frequent author for Spidell's California Tax Letter, the 1996 recipient of the U.S. Small Business Administration's Accountant Advocate of the Year Award, and is a graduate of Thomas Edison State College in New Jersey.

### **Speaker: Lisa Ihm, EA**

Lisa Ihm, EA has been teaching seminars nationwide since 1986 for many organizations including the California Society of Enrolled Agents, California Society of Tax Consultants, the National Association of Tax Practitioners, and many other state and regional groups of tax professionals. She has spoken in 43 states covering a broad range of topics in many areas of taxation. Rather than simply reciting the rules, she digs below the surface to determine how they will affect real-life taxpayers, each of whom has a unique and often interesting situation. She's not going to tell you the new standard deduction amounts or the new standard mileage rate; your computer will know those answers. She'll make you think about how the new rules will affect your clients and how you can use those new rules to your clients' benefit.

In 2008 there were 5 tax related pieces of legislation passed that helped make our 2009 Tax filing Season more "interesting." Already in 2009 we have had as many tax related pieces of legislation. This class is designed to make you knowledgeable about these changes in tax law and give you tools you can use in the upcoming 2010 tax filing season.

### **San Diego Chapter CSEA – SEMINAR REGISTRATION FORM**

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

(Circle One) CTEC EA CPA ABA

Enrollment or License # \_\_\_\_\_

(Required for CPE Credit)

Paying by Visa / MasterCard (circle one)

Name on Card: \_\_\_\_\_

Card Number: \_\_\_\_\_

Exp. Date \_\_\_ / \_\_\_ 3 digit code \_\_\_\_\_

Amount to charge to card: \$ \_\_\_\_\_

Billing address (if different from above)

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Seminar	Registration Deadlines	Amount
Dec. 16 <sup>th</sup> : 2009 Federal & California Tax Update	By Oct. 31 <sup>st</sup> : \$120	\$
	Nov. 1 <sup>st</sup> – day of seminar: \$200	\$
TOTAL ENCLOSED		\$

#### **MAIL REGISTRATION FORM & PAYMENT TO:**

ROGER GARAY, EA.  
2065 ARNOLD WAY #103  
ALPINE, CA 91901  
(619) 445-5523 \* Fax (619) 445-1421  
[rogertax@ix.netcom.com](mailto:rogertax@ix.netcom.com)

**(Make checks payable to SD-CSEA)**

\*Fees are NON-REFUNDABLE but attendee may be changed

**All Seminars will be held at National University, 9388 Lightwave Avenue, SD 92123  
Registration begins at 7:30am**



# COD in the Real World 2-Day Hands-On Workshop

February 1 & 2, 2010

Presenter: Lisa Ihm, EA

Feeling a little panic at the prospect of preparing returns with COD, Foreclosures, Short Sales, or Bankruptcy? Think you've got some understanding, but afraid you're missing pieces of the puzzle? Get hands-on training before facing your clients.

2-day workshop featuring case studies in a workshop format.

Each attendee will receive a USB flash drive containing Excel worksheets to simplify calculations.

Bring your laptop computer and work the cases just like you will in your office (not required).

- Interview worksheet to gather needed information from client
- Learn where to get the numbers your client can't provide
- Understand why the info on the 1099s is not the info that goes on the return
- Use the internet to determine the sale date and price
- Learn how to determine whether a loan has been discharged
- Understand how bankruptcy works and how to prepare the debtor's tax return before, during, and after the bankruptcy
- Complete returns start to finish to experience how numbers flow onto forms
- Checklist to verify all required steps have been completed
- Learn how to answer the question, "Should I do a short sale, declare bankruptcy, or let them foreclose?"

**Location:** Crowne Plaza Hotel, 2270 Hotel Circle North, San Diego, CA (619) 297-1101

**Registration/Check-In:** 7:30AM

**Seminar:** 8:00 AM – 5:00 PM

Discount for repeat attendees - \$20 off if you've taken one of Lisa's 6- or 8-hour COD seminars

**Early Bird Registration \$195 (through 1/11/2010)**  
**(CSTC Members ONLY)**

**Discount Fee \$175**

**Regular Registration \$250 (after 1/11/2010)**

**Discount Fee \$230**

**Date attended prior full day seminar** \_\_\_\_\_ **Location** \_\_\_\_\_

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Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_ E-mail \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_

EA  CPA  Attorney  CTEC License, Registration or Enrollment # \_\_\_\_\_

Check # \_\_\_\_\_ **Make checks payable to "CSTC San Diego Chapter"**

Credit Card: Type \_\_\_\_\_ Name on Card \_\_\_\_\_ Card # \_\_\_\_\_

Exp. Mo. \_\_\_\_\_ Yr \_\_\_\_\_ Security Code \_\_\_\_\_ Signature: \_\_\_\_\_

**Mail registration to: Duane Lewis, 8530 La Mesa Blvd, Ste. 306, La Mesa, CA 91941. FAX 619-698-9199**

**Our colleagues over at CSTC (California Society of Tax Consultants) want to put on a last minute Cancellation of Debt seminar just before tax season starts to help you get ready for those problem clients with COD, foreclosure and bankruptcy issues. Please respond to [info@westax.com](mailto:info@westax.com) immediately if you will attend this workshop-even though you will be sending in your registration and payment later. They need to have a minimum number of attendees or the workshop will be cancelled.**