



# The Bulletin



East Bay Association of Enrolled Agents  
*To Enhance and Protect the Professional, Economic, and  
Educational Interests of all Enrolled Agents*

November, 2006

## General Meeting

NEXT MEETING Wed, November 15, 2006

Place: **PLEASANTON Crowne Plaza Hotel**

Go to <http://www.ichotelsgroup.com/h/d/cp/1/en/hd/ccrig>  
then click on Map/Directions for personalized directions

4:30 Board Meeting

6:15 Hospitality

6:45 Dinner Buffet

8:00 Program:

Cost: \$35.00 with reservation by 5pm Friday 11/10  
\$45.00 without reservation

Reservations: (800) 617-1040 or (925) 691-1866  
email: [registration@ebaea.org](mailto:registration@ebaea.org)

## STANDING RESERVATIONS

Our Chapter maintains a "Standing Reservations" list for those EAs who attend most monthly meetings. If you are on this list, you need to contact the Chapter office only if you will NOT be attending the meeting. If you wish to be added to or removed from the "standing reservations" list, call (800) 617-1040

## November Topic: "Federal Entitlement Programs: Medicare, Medigap and Medicaid"

by Charleen Daefield EA, CPA, Program Co-Chair

Art Werner, Esquire, a longtime favorite speaker, will be presenting our education session this month. He will be speaking on issues that affect many of our clients. Come and learn about the recent changes in Medicare and MediCal to help your clients.

## IN MEMORIAM

We are very saddened to report the passing of Emma Eversole early in October. As most of you know Emma was a Past President of the East Bay Chapter. She will be missed by all.

## PRESIDENT'S MESSAGE

by Bonnie Buhnerkempe EA, CFP®, CSA

I hope all of you were able to be at Tax Talk. Remember we still have a dinner meeting this month on November 15<sup>th</sup>. I don't know about you but I am still trying to finish tax season before I get ready for the next tax season. The chapter office committee is busy trying to find new solutions for the office. If you want to serve on the board next year please make sure you let Duncan know. The board is a great way to get to know others within the organization and to have a lot of fun while helping the organization at the same time. Thank you to all who worked on the Tax Talk Seminar.

## HELPFUL HINT RE EA NUMBER

Have you ever gone to a continuing education event and found that you couldn't complete your CPE form because you couldn't remember your EA number? Try this: enter your EA number as a phone number and the name as "EA" in your cell phone. (Now you just have to remember to have your cell phone with you!)

## EBAEA AMBASSADORS

In an effort to promote networking and member retention, the East Bay chapter is launching an exciting opportunity. We are looking for Ambassadors to "work" the monthly dinner meetings. The role of the Ambassador is pretty simple: 1) When a new member comes to their first few meetings and is trying to get to know people, be willing to introduce them around, invite them to sit at your table, and include them in conversations. Have you considered yet a way to be involved? Is this something you can do? Well, can you answer warmly when a stranger comes to ask you a question? Can you introduce people? If you said yes, you could be an Ambassador! And best of all, this does not require a once-a-month-for-a-whole-year commitment. Can you do this for at least 3 meetings a year? This will also be a great way for YOU to meet some of the new members that come in and be instrumental in making them see the benefit of coming back.

If this Ambassador Program sounds like something you can help us with, please contact Judi Gilmer, EA at 925-373-1468, or call the Chapter Office at (800) 617-1040. No one should ever leave a dinner meeting feeling like an outsider. The East Bay Chapter is about Education and Networking, and the first contact for that is at our dinner meetings. You CAN make a difference in another EA's career!

### **LAST CHANCE FOR QUICKFINDERS!**

by *Diann Gross EA*

Due to past difficulties with the deliveries of some of the orders, I had a meeting with the Quickfinders sales people, and I have made special arrangements with them this year. All orders with **our code (Q521)** on them will be **special group-priced** and will be **sent directly to you!** (Be sure to use the **GROUP PRICE on your order.**) **The Deadline will be 12/1/2006.** Quickfinders will also be **donating \$5 per book to scholarship at CSEA.** I am sure this will speed things up and be much more efficient for you this way. I urge you to make your orders early using the *special code: Q521 See special forms below.* Please call me at (925) 736-3853 voice/fax with questions.

### **NAEA Political Action Committee – A Primer**

Did you know NAEA has a PAC? Do you know what a PAC is? If the answer to either of these questions is no, then you're not alone and you've come to the right place to find out.

Earlier this year, NAEA started a Political Action Committee (PAC) in order to contribute to federal election campaigns. Because federal law prohibits member organizations (like NAEA) from making direct contributions, PACs were created for association members to pool financial resources and collectively support candidates who share their positions on critical issues.

NAEA started a PAC to help elect to the U.S. House and U.S. Senate candidates who support policies that are favorable toward enrolled agents. With a completely non-partisan approach, NAEA PAC will work with both Democrats *and* Republicans, giving enrolled agents another voice in Washington, DC.

The PAC is administered by NAEA staff and its operations are overseen by a PAC Steering Committee, made up of five NAEA members. Disbursements to candidates are made based on a stringent set of criteria and must be approved by the Steering Committee. In a nutshell, NAEA PAC intends to support incumbent members of Congress who sit on the tax-writing committees.

Since March, NAEA PAC has raised over \$13,000 from over 120 NAEA members. The Steering Committee has approved the first two disbursements, which will be made prior to this November's elections.

For more information about NAEA PAC, please visit [www.naea.org](http://www.naea.org)

### **REMINDER - NEW DINNER POLICY**

As most of you know the cost of everything keeps going up and we have been trying to keep the price of the dinner meeting low which means we have been losing money. Since that is not a financially responsible thing to do, at the February Board meeting we had a good debate on how to handle the situation. The conclusion was to raise the price of the dinner meeting but to have a larger discount if you register on time. Therefore, the cost of the dinner meeting effective May 2006 is \$45 but there is a \$10 discount if you register by 5:00PM the Friday preceding the meeting. If you have a reservation and need to cancel, you must do so by 5:00PM on the Friday preceding the meeting to avoid being charged. If you register at the door the cost is \$45 as long as there is room (so if you register early, the price is only \$35). **IF YOU MAKE A RESERVATION AND DO NOT ATTEND YOU WILL BE CHARGED FOR THE DINNER YOU ORDERED.**

### **LOOKED AT THE NAEA WEBBOARD LATELY?**

by *Duncan Sandiland, EA etc*

I recently needed some help on a divorce-related conflict of interest letter, so I went to the NAEA Webboard at [www.naea.org](http://www.naea.org). I found the info I needed, then I started poking around a bit. Here's an interesting tidbit I found. We all do something like this, but Donald Rihn, EA, seems to do it better than most. Make sure you read the last line...

"While I try to get an engagement letter from all clients, my filing instructions and cover letter to the finished tax return has the following statement:

"I have prepared this return from information that you have furnished and have not verified any amount. Under the Internal Revenue Code, taxpayers are required to maintain records supporting this return. You are responsible for maintaining all necessary records and for the accuracy and completeness of the information submitted to me in connection with the preparation of this return. This includes travel and entertainment records as well as vehicle expenses and proof of business use if applicable. It is my understanding that all income for 2005 has been reported and that all information that you have furnished is accurate."

If a particular client has consistently shown a loss on a Schedule F, C, or E, I advise him, in this same cover letter, of the possibility of an audit. During a recent audit on a consistently large Schedule C loss over several years, the IRS auditor commented "... covered yourself, didn't you!"

## **STANDING RESERVATION DINNER LIST**

Now that the new fiscal year is here, the Chapter office needs to update the Standing Dinner Reservation list. If you are now on the list and would like to be taken off or would like to be put on the list, please call the Chapter office. Those who are on the Standing Dinner list, only have to call the Chapter office when you **can not** attend a monthly Dinner meeting. Note that if you are on the list and DO NOT cancel your reservation, you WILL BE CHARGED for the dinner we have to buy, regardless of whether or not you attend the meeting. Finally, if you are on this list, please check each month to see if you need to tell us your choice of entrée.

## **NOTES FROM IRS AUR PHONE FORUM**

*by Duncan Sandiland, EA etc*

- 1) Because AUR (Automated Underreporter Program) is a compliance matter, check-the-box authority does NOT apply, you must have a POA to discuss with IRS.
- 2) When responding to AUR CP-2000s, do NOT file a 1040X as this is a tax filing and it will be diverted to a different part of the Service Center. Instead, use the envelope provided and reply in writing to the CP-2000 inquiry. If you need to file a 1040X to properly account for various issues, you must attach the CP-2000 response sheet in front of the 1040X AND write "In response to AUR CP-2000 - DO NOT PROCESS" in RED ink across the top of the 1040X.
- 3) At this time, you cannot use e-services to access IRP information on an AUR inquiry.
- 4) And the big bombshell: As far as AUR is concerned (and I followed up on this with Gerry Kelly-Brenner of IRS), we do NOT need to list every single transaction on a Schedule D. All we have to do is list one line with the totals from each 1099-B, indicate we have backup, and actually have the backup! How's that for a timesaver! It was also pointed out that as long as the gross proceeds totals on the Schedule D match the 1099-Bs, the computer never picks up the fact that there is no detail on the Schedule D and so it never comes to the attention of AUR.

## **OFFICE SPACE TO LEASE**

Office to sublet: Sunny, private 130 sq.ft. air-conditioned office on second floor in prime Rockridge, Oakland location. Share 415 sq.ft. common space with two other tax professionals. Includes access to copier, fax machine and tax library. Walk to BART. Easy freeway access. Available November 1, 2006. \$775 includes all utilities. 510-655-9893. Sheila Khalov, EA

## **NEW EA LOOKING TO HELP YOU**

Yvette Koehler, EA (new member) is willing to do your simple easy returns and take them off your hands. Call (925) 735-2407 or email to [ykoehler@sbcglobal.net](mailto:ykoehler@sbcglobal.net). I thank you very much, Yvette.

## **CHAPTER OFFICE OPPORTUNITY**

As most of you are aware Duncan has resigned as Chapter Office. The Chapter Office oversight committee has been already working on some different strategies to help are registration process go smoother in the future as we look for a new host of the Chapter Office. As soon as the committee has a revised list of what the Chapter Office will be responsible for it will be emailed to all who are on the distribution list. If you are interested in hosting the Chapter Office once the revised list of duties is out please contact us so you can be considered for the job.

## **HELP WANTED**

Lodestar Private Asset Management LLC, an independent RIA in Alamo, is seeking an E.A. with an established client base to join our growing wealth management office and provide tax services to our clients. Excellent opportunity for referrals from in-house fee-only CFPs, Investment Advisors, and Estate Planning Attorney. Please contact Scott Miller (925) 838-1234 for more information.

## **TAX PRACTICE WANTED**

EA interested in buying a Tax Practice. Will consider immediately buying part or all of a practice, or a gradual multi-year buy-in transition. Prefer Hayward/Castro Valley/Pleasanton and surrounding areas. Contact [mchang402@cs.com](mailto:mchang402@cs.com)

## **TAX PROFESSIONAL WANTED**

Fremont Business Services Firm seeking year-round degreed tax professional to join our firm. We are looking for a team player with over five years experience preparing individual, corporate, LLC and partnership tax returns. Experience in preparing fiduciary and nonprofit returns is helpful. Candidate must be experienced in QuickBooks and the use of tax software. Enrolled Agent or CPA preferred. E-mail resume to [yvonnebc@aol.com](mailto:yvonnebc@aol.com) or Fax to 510-657-9503.

## **GOT TOO MANY CLIENTS? WANT MORE CLIENTS?**

Every year, some members hit or exceed their capacity. We just have too many clients and too much work to do. Most of these are good quality clients who have come from good referrals, so we feel guilty about saying "no". How do you scale back to more reasonable working hours without losing the value of these clients?

If you fit this profile, and you want to turn these clients (and maybe some of next year's incoming referrals) over to another EA instead of some unqualified shmoe down the street, please call the Chapter Office. We will put you in contact with some Chapter members who are looking to grow their practices. Suitability,

compensation and other issues are up to you to work out – we’re matchmakers, not marriage counselors!

Similarly, if you are looking to expand your practice, please give us a call and we’ll add you to that list.

### **CSEA ANNUAL LEGISLATIVE DAY** **JANUARY 5, 2007, SACRAMENTO**

*by Lillian Lea, EA, East Bay Chapter Legislative Chair*

CSEA will be having our annual legislative day in Sacramento on Friday January 5. The last time “ledge” day was in Sacramento our chapter had the highest attendance, with 27 people attending - so we have a reputation to uphold.

We alternate years between the district and Sacramento, holding the event in Sacramento in the years right after an election, when the legislators are newly elected and need to be educated about Enrolled Agents.

CSEA provides a packet of information for each legislator, and our job is to show up, introduce ourselves, give them the packet, and answer any questions they might have. Very often their question is “what is an Enrolled Agent”, and you should be able to handle that one easily.

The event will be from 11:30 to 3:30, so there will be no need to stay overnight. We will have sign-up sheets for car pooling at Tax Talk and at the November and December chapter meetings. Or e-mail [Lil@LeaTax.com](mailto:Lil@LeaTax.com) to say you can drive, where from, and how many people you can take or to say where you need a ride from.

This event is fun and a service to your fellow EAs, plus you get to visit the beautiful capitol building in Sacramento. This is your way to participate in democracy on behalf of your profession, and to help CSEA to continue to have a great reputation with the legislature.

They pay attention because we pay attention.

### **CALENDAR OF EVENTS**

Mark your calendars

#### **November 2006**

**1-3** EBAAEA TaxTalk seminar  
Crowne Plaza Hotel, Pleasanton

**15** EBAAEA Dinner Meeting  
Art Werner on Medicare etc  
Crowne Plaza Hotel, Pleasanton

#### **December 2006**

**20** EBAAEA Dinner Meeting

### **OFFICE STAFF WANTED**

Crowne Plaza Hotel, Pleasanton

#### **January 2007**

**5** CSEA Legislative Day  
State Capitol, Sacramento

**17** EBAAEA Dinner Meeting  
Crowne Plaza Hotel, Pleasanton

#### **February 2007**

**21** EBAAEA Dinner Meeting  
FTB Panel: Steve Sims and Karen Brosi  
Crowne Plaza Hotel, Pleasanton

#### **March 2007**

**21** EBAAEA Dinner Meeting  
IRS Panel: Joe Calderaro  
Crowne Plaza Hotel, Pleasanton

### **HELP WANTED**

Tax Preparer needed full time during tax season and part time the balance of the year. Quick Books, 10 key by touch, payroll tax reporting and phone skills all very helpful.

Salary based on experience. Located in Danville. Fax resume and salary requirements to 925-855-0844

### **Small Group Tax Meetings**

**Antioch /Brentwood** Every Fri 8:00am  
Brentwood Café, Brentwood  
**Ken Seamann EA** (925) 634-8297

**San Ramon** 2<sup>nd</sup> Fri, 7:30am  
Contact Bonnie for location  
**Bonnie Buhnerkempe EA** (925) 855-0829

**Danville Area** 4<sup>th</sup> Tues, 9:30am  
Pascals French Oven, 155 Railroad Ave, Danville  
**Michael Power EA** (510) 366-8836

**Livermore Area** 1<sup>st</sup> & 3<sup>rd</sup> Wed, 7:30am  
Beebe’s Sports Bar&Grill, 915 Club House Dr, Livermore  
**Richard Goudreau EA** (925) 606-6672

**Oakland/Berkeley** 3<sup>rd</sup> Fri, 10:30am  
Contact Phil for details and location  
**Philip Fiegler EA** (510) 530-1174

**So. Alameda County** 1<sup>st</sup> Wed, 9:30am  
Dino’s, 1 block W of I-880 on Industrial Blvd, Hayward  
**Sal Romo EA or Walt Thomas EA** (510) 487-1691

Full-service tax and financial services firm has an opening for one talented office administrator/junior professional person needed full time during tax season and part time the balance of the year. General office skills preferred, especially good phone skills, and some degree of experience in QuickBooks/basic accounting, basic tax preparation and computer/internet skills will be helpful but not required. The most important requirements are an outgoing attitude and a hunger to learn, as this is a fantastic opportunity to absorb a wide array of knowledge in many different fields. Salary based on qualifications, benefits also offered. Office located in Walnut Creek area. Fax qualifications to 925-691-1041.

## **PRACTICE MANAGEMENT GROUP?**

by *Duncan Sandiland EA*

Put any three EAs together, and pretty soon we'll start talking about practice management and clients. Some of those conversations can be extremely informative, but there comes a time when talking just isn't adequate. Over the last few months, a surprisingly large number of Chapter members have asked me if we could get together some sort of discussion group which could travel to different members' offices to see how things worked there. That sounds like a grand idea.

Since most of my good ideas were originally learned from other people and then adapted to my own changing needs, I will volunteer to be the guinea pig in this project. We are looking for maybe a half-dozen members willing to have some Chapter members visit their office, conduct a tour and answer question about office procedures and related topics. I expect we'd visit one office per month or thereabouts until the end of this year, and each visit might take from one to three hours, depending on turnout and questions. Note that we can also discuss home offices if interest warrants.

All Chapter members are invited to participate, whether freshly minted, heavily experienced or somewhere in between. We might need to put a limit on how many can comfortably fit into some offices, so please respond early for best selection. Call me at (925) 691-1040 for more details.

## **2006 - 2007 Board of Directors and Committee Chairs**

Web Page <http://www.eastbayea.org>

President: Bonnie Buhnerkempe EA, etc	925-855-0829	CSEA Directors: Thomas Johnston EA	925-828-4500
1st VP: Thomas Johnston EA	925-828-4500	Walter Nygaard EA	510-547-0440
2nd VP: Walter Nygaard EA, etc	510-547-0440		
Treasurer: Clare Flores EA	510-785-8356	<b>Education Committee, (1<sup>st</sup> VP)</b>	
Secretary: Peggy Hall EA	925-388-1040	<b>Chair:</b> Tom Johnston EA	925-828-4500
Past President:		Inter-chapter Liaison: (vacant)	
Duncan Sandiland EA, etc	925-691-1040	Tax Talk: Diane Jaworski-Faulhaber EA	510-538-0948
2 Year Directors:		Program: Philip Fiegler EA	510-530-1174
Philip Fiegler EA	510-530-1174	Charleen Daefield EA	925-872-4075
Barbara Sparks EA	925-634-8630	Scholarship: Norm Madge EA	510-489-8713
Norman Madge EA	408-398-5737	Continuing Ed: Joanne Anderson EA	925-938-9086
Charleen Daefield EA, etc	925-872-4075	Mini Seminar Team: (vacant)	
1 Year Directors:		<b>Administration Committee (IPP)</b>	
Janet Bridges EA	510-538-0401	<b>Chair:</b> Duncan Sandiland EA	925-691-1040
Judi Gilmer EA	925-373-1468	Audit: Dave Britton EA, etc	510-794-1040
Joanne Harteau EA	510-683-4688	Bylaws/SOP: Sal Romo EA	510-417-9492
Eleanor Power EA	510-525-9987	Budget & Finance: Walt Thomas EA	510-725-8356
Dagmar Bedard EA	510-537-3883	Chapter Off.: Bonnie Buhnerkempe EA	925-855-0829
<b>Communication Committee, (2<sup>nd</sup> VP)</b>		Legislative Affairs: Lillian Lea EA	510-526-2220
<b>Chair:</b> Walter Nygaard EA	510-547-0440	Nominating: Kim Kastl EA	510-537-2122
Membership: Barbara Sparks EA	925-634-8630	Strategic Advisory: (vacant)	
Judi Gilmer EA	925-373-1468	Bulletin: Eleanor Power EA	510-525-9987
Outreach: (vacant)		TAX Agency Liaison:	
Public Affairs: Michael Barrick EA	510-339-7039	LaRee Jensen-Graham EA	510-601-0409
Social Affairs: Janet Bridges EA	510-538-0401		

## **EAST BAY ASSOCIATION OF ENROLLED AGENTS**

POBox 23125  
 Pleasant Hill, CA 94523  
 (800) 617-1040  
 (925) 691-1866  
 fax (925) 465-7474  
 e-mail: [ebaea@ebaea.org](mailto:ebaea@ebaea.org)

**CSEA East Bay Chapter  
DISCOUNT CODE: Q521**

Your association receives a donation for each product purchased under this special discount code—and you receive a discounted price on every product! Prices and donation amounts are listed on order form.

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**1040 Quickfinder Handbook**

The Original Quickfinder! Covers all aspects of preparing a 1040 return. FREE— Personal Income Tax Organizer and Deduction Finder®!

**Small Business Quickfinder Handbook**

The first-stop resource for preparing tax returns for every type of small business—partnerships and corporations—plus estate, trusts and tax-exempt organizations. Forms 1065, 1120, 1120S, 1041, 706, 709, 990.

**All States Quickfinder Handbook**

Complete summary of each state's part-year and nonresident instructions for individual tax returns, with over 500 pages of easy-to-find tabs—eliminates hours spent downloading out-of-state instructions online!

**Accounting and Bookkeeping Quickfinder Handbook**

Designed for tax professionals! Create the accounting records needed to prepare tax returns and conquer clients' accounting challenges.

**Depreciation Quickfinder Handbook**

The only guide you need to deal with depreciation—quick answers to all your depreciation and business property questions. If you have business clients, we'll save you time and headaches!

**Tax Planning for Businesses Quickfinder Handbook**

Stay up to speed on new business tax saving strategies and leverage changing tax rules to your clients' advantage with this new Handbook! Tax planning tips will save tax dollars at every stage of a business operation.

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Income, estate and gift tax *planning* for individuals, with strategies to reduce individual clients' federal tax burdens. Tables, charts, examples, 1040 Tax Planning Roadmap!

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A monthly newsletter full of fast, accurate tax and financial planning information. Includes briefings of important tax developments, practice management tips, and Q&As based on actual customer questions.

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Durable, laminated fold-out tools with the Quickfinder tables and charts you use most often, right at your fingertips!

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- Orders must be received by Dec. 1, 2006 to receive group pricing.
- Payment must be included.
- Make checks payable to Quickfinder.

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11828 Dublin Blvd. Ste P  
Dublin, CA 94568-2830  
(925) 736-3853 Fax

**CSEA East Bay Chapter**

**DISCOUNT CODE: Q521**

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<b>All Handbooks</b>	\$4	\$4 each	For quantities greater than 11, call for shipping/handling pricing	
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**NEW! Increased Donation Amount**

Every Quickfinder purchase you make earns money for your association! See donation amounts listed below!

Orders must be faxed to (925) 736-3853 or mailed to:

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**SOCIETY DISCOUNT CODE  
 Q521**

Product	Qty	Reg.	Assoc.	Donation
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Tax Planning for Individuals • 1040	2 – 10	\$41		
Tax Planning for Businesses • Small	11 – 20	\$38		
Business • Depreciation • Accounting and Bookkeeping	21+	\$36	<b>\$33</b>	
		<b>Group price</b>		
<i>All States Quickfinder Handbook (Print or CD)</i>	1	\$76		\$5.00 ea
	2 – 10	\$72		
	11 – 20	\$68		
	21+	\$63	<b>\$58</b>	
		<b>Group price</b>		
Package QF-X (Individuals or Businesses)	Each	\$10	\$9	\$1.00 ea
Tax Tables (Individuals or Businesses)	Each	\$10	\$9	\$1.00 ea
Quickfinder Tax Tips Newsletter	1 yr/12 iss.	\$49	\$45	\$5.00 ea
Handbook-Based Self-Study CPE	Per course	\$22	\$19	\$2.00 ea
Ethics Self-Study CPE	Per course	\$22	\$19	\$2.00 ea
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3					
4					
5					
6					
7	Subtotal: Add lines 1 through 6.				
8	Shipping & Handling: Please see the chart above for s&h costs.				
9	Sales Tax: Add your exact state and local tax. Call 800-510-8997 for assistance.				
10	GRAND TOTAL: Add lines 7, 8 and 9.				

We are placing one group order in order to benefit from the best price.

All orders must be received by Dec. 1, 2006. Payment must be included. Make checks payable to Quickfinder.



**Questions about ordering? Call us toll-free at 800-510-8997!**

FOB Shipping Point

