

PALOMAR CHAPTER
ENROLLED AGENT FORUM
California Society of Enrolled Agents

JANUARY 2010 Issue



Date: January 20, 2010

Place: Escondido Country Club
1800 Country Club Lane
Escondido, CA

Time: 4:30-5:30 Board Meeting
All members welcome!
5:30-6:00 Registration
And Social Time

6:00 pm until 9:00 pm

Tax update Fed/State

John Haggerty
And

Social Security Update

Social Security Administration
Office

Cost: \$30.00 Members with reservations
\$32.00 Non-members with reservations
\$20.00 Guests who are not active EA's,
CPA's, CTEC's or Attorney's

For Reservations Please call call
Richard Moore at 760-438-4030 by
Noon Monday January 18th or
email him at RWMooreInc@aol.com
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Chapter Breakfast Meeting

Place: Denny's Restaurant
1-5 and Carlsbad Village Drive
Carlsbad, CA

Date: Wednesday, January, 2010
Time: 7:30 am

Reservations are not required for Breakfast Meetings

Inside this Issue:

- 1 January Chapter Dinner
- 1 January Chapter Breakfast Meeting
- 2 Message from the President
- 2 Palomar Chapter Upcoming Events
- 3 CSEA/IRS 2010 Practitioner Seminar
- 4 CSEA Mission Statement
- 4 Board Meeting Minutes Summary
- 5 Meeting Speakers
- 5 Palomar Chapter Officers
- 5 Chapter Directors



Be sure to visit our website
for details on upcoming events and news of our
Chapter

WWW.CSEAPALOMAR.COM

If you know of anyone that may enjoy receiving a paper copy of our monthly FORUM, please contact Cheryl Kerber (see page 4). She will be happy to add their name to the list.

PRESIDENT'S MESSAGE
JANUARY 2010

As I write this I have Lacerte 2009 loaded on to my computers. I have done two preliminary returns and I have all my organizers ready to send out. So why do I feel so nervous about this coming tax season. It may be all the changes that have happened to the Federal and California returns for 2009. Last year was difficult with the changes during tax season and California not sending out refunds timely. Will they be holding money back again? My bet is yes. Will clients want to change their California WH because they dislike giving California a loan? Maybe, my clients seemed resigned to the nonsense in Sacramento. If you do not get Spidell's California Taxletter, this would be a good time to find a friend with a copy. The January 2010 copy has an excellent article about the changes to military families. The Military Spouses Residency Relief Act (MSRRA) changes how Spouses will be taxed in California. For non-resident spouses it will be very good.

John Haggerty will be giving us his update on January 20th. John always has an excellent handout that I use as the clients start asking me questions. So be sure and make a reservation so he knows how many handouts to have printed. This is the time of year to make friends with as many of the members as you can, they will be your backup resource.

I wish you all a very profitable tax season and a wonderful year. See you on January 20th!

Lois L. Leonard EA

2010 Standard Mileage Rates

- 50 cents per mile for business miles driven
- 16.5 cents per mile driven for medical or moving purposes
- 14 cents per mile driven in service of charitable organizations

Martin Luther King Jr Day
Celebrated in 2010 on
January 18th



Happy New Year and may 2010 be a
GREAT Tax Season

WWW.CSEAPALOMAR.COM
Check us out!

**PALOMAR CHAPTER
CALENDAR OF COMING EVENTS**

January 2010

- 20 Palomar Chapter Meeting—Escondido Country Club—Escondido CA
- 27 Palomar Chapter Breakfast Meeting—Denny's at I-5 and Carlsbad Village Drive

February 2010

- 17 Palomar Chapter Meeting—Escondido Country Club—Escondido CA
- 24 Palomar Chapter Breakfast Meeting—Denny's at I-5 and Carlsbad Village Drive

March 2010

- 17 Palomar Chapter Meeting—Escondido Country Club—Escondido CA—DARK
- 24 Palomar Chapter Breakfast Meeting—Denny's at I-5 and Carlsbad Village Drive

April 2010

- 21 Palomar Chapter Meeting—Escondido Country Club—Escondido CA
- 28 Palomar Chapter Breakfast Meeting—Denny's at I-5 and Carlsbad Village Drive

**CSEA-IRS 2010 Practitioner Seminar
Monday, January 11, 7 Hours CPE**

LOCATION:

California Center for the Arts 340 N Escondido Blvd, Escondido, CA

To see other locations available during this same week, check the website listed below.

TOPICS COVERED:

Collection Update, Offers in Compromise, Taxpayer Advocate Service - IRS & FTB, Criminal Investigation, Modernized e-File, California State Appeals Process, California Underground Economy.

COST:

\$125 Early bird registration, received by 12/11/2009

\$150 regular registration, received by 12/31/2009

\$165 registration after 12/31/2009 or at the door.

To register online & pay by credit card (by 12/31/2009), go to:

<http://www.media-enterprises.com/csea>

To register after 12/31/2009, or register and pay by check or money order (anytime), fill out this form and mail with your payment to the address shown below. If you have any questions, contact Ronald Watts, EA at 858-481-5809 or e-mail at rgwatts@sbcglobal.net.

Check in Time:

Registration starts at 7:00 AM, seminar from 8:00am - 4:00 pm, 1 hour lunch included.

Your name: _____ EA, CPA, Attny or CTEC Number: _____

Company: _____

Address: _____

City: _____ State _____ Zip Code _____

FAX: (____) _____ e-mail _____

Please indicate if you would like a vegetarian Lunch _____

Mail to: Ronald Watts, E.A.
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PALOMAR CHAPTER OFFICERS

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**Chinese New Years
January 26th
It is year 4707!**

Upcoming Chapter Events

January 11 2010—	IRS Practitioner Seminar
January 20 2010—	Tax Update/ Federal and State John Haggerty Social Security Update SS Administration Office
February 17 2010	Round Table
April 21 2010	Income/Estate Tax Update Stuart Simmon

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FORUM is a monthly publication of the Palomar Chapter of the California Society of Enrolled Agents. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is published with the understanding that the publisher is not engaged in rendering legal, accounting or other professional service. If legal or accounting advice or other expert assistance is required, the services of a competent professional should be sought. Items for publication must reach the Editor by the 25th day of the month prior to the publication month. Each Chapter member is expected to furnish material. Rights are reserved to abridge, summarize or excerpt items. The more data submitted, the more valuable the FORUM becomes. Items excess to one issue are retained for following issues. Views expressed in columns, guest editorials, cartoons and articles do not necessarily represent the opinions of the Editor.

**ENROLLED AGENTS
FEDERALLY RECOGNIZED TAX PROFESSIONAL
THE TAXPAYERS REPRESENTATIVE.**