

PALOMAR CHAPTER
ENROLLED AGENT FORUM
California Society of Enrolled Agents



FEBRUARY 2009 Issue

Palomar Chapter Dinner Meeting

Date: February 18, 2009

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

Time: 4:30 pm Board Meeting
All members Welcome!

5:30 pm Social Time

6:00 pm Ethics and Preparer
Penalties/Disclosures

Presented by Lori Cacioppo

Dinner Buffet

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

For Reservations Please call
Mary Ybarra at 760-752-8209 by
Noon Monday February 16 or
email her at
Mary.ybarra@ybarraincometax.com
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Chapter Breakfast Meeting

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

Date: Wednesday, February 25
Time: 7:30 am

**Reservations are not required for
Breakfast Meetings**

*"Taxes: Of life's two certainties, the only
one for which you can get an automatic
extension.". Author Unknown*

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Dates to Remember

February

16 Presidents Day

March

15 (Actually the 16th this year)
Deadline for Corporation and
S-Corporation Tax Returns

April

15 Deadline for Individuals and
Partnership Tax Returns

May

18-20 Super Seminar 'A' Las Vegas
21-21 Super Seminar "B" Las Vegas
25 Memorial Day
28-30 Super Seminar Reno

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

WWW.CSEAPALOMAR.COM

A Message from the President

The President's message will be available shortly.

Happy New Year 2009 to everyone. We should all be knee deep in tax work by now with year end payroll issues, 1099's and working our way into corporate taxes due mid March, or mid February for my client that ended his year in November (and he still hasn't given me anything to work with). It seems that many of us were able to take off on January 21st to attend the half-day seminar on pension plans, human resource issues, and John Haggerty's timely tax update. Thank you to all that attended and to all the presenters.

One item that jumped out at me was the benefit to taxpayers that no longer itemize deductions because they have very little, or no, home mortgage interest. They will be able to add an additional \$500 or \$1,000 to their standard deduction amount in place of their property taxes. This item is at the top of page 139 in Publication 17.

I have asked Tony Davis to put together a slate of officers for the new year (beginning July 2009). Please consider serving on the board of directors. Everyone has some ideas on how this chapter should be run and how to improve on what we already have. I will have served two years as president and it is time for some new blood.

Society headquarters in Sacramento is raising funds for the Political Action Committee and is conducting a raffle. The top prize is a week's stay at a condo in Hawaii plus air fare. Tickets are \$10 each or 3 for \$25. The winner will be determined in May. I will have them available at the February 18th meeting when the IRS speaks on ethics and preparer penalties. For the March 18th meeting, we will have a round table discussion, so bring your questions and problems to the meeting.

Remember we are all working on the same problems. If you need help with something, reach out to a chapter member and get some help. Quite often I will call two or three members to discuss a problem and get different view points, then armed with that and additional information, I am able to make an informed decision.

Hope to see everyone at the next meeting.

Ronald G. Watts, E.A

Increasing our Visibility on our Website

Cal Ellisor and his team have been working to add content to our website, www.cseapalomar.com. To this end, Cal has requested members provide him with contact information so that new clients may be able to find an Enrolled Agent that meets their needs.

If you have not already done so, please email the following information to Cal at cal@mlbinc.com:

WWW.CSEAPALOMAR.COM

Name
Business Name
Address
Phone Number
Email Address
Web Address

PALOMAR CHAPTER CALENDAR OF COMING EVENTS

February 2009

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

March 2009

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

April 2009

- 15
- 22 Palomar Chapter Breakfast Meeting—Denny's at I-5 and Carlsbad Village Drive

May 2009

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



PALOMAR CHAPTER OFFICERS

President: **Ron Watts, EA**
rgwatts@sbcglobal.net
858-481-5809

1st Vice President **Miles Lawrence, EA**
mlawrence@lacprofgroup.com
760-438-4030

2nd Vice President **Mary Ybarra, EA**
Mary.ybarra@ybarraincometax.com
760-806-0090

Secretary: **Open at this Time**

Treasurer: **Nancy Dixon, EA**
vistadixon4@netzero.com
760-726-8490

Past President: **Calvin Ellisor, EA**
cal@mlbinc.com
760-436-9044



WWW.CSEAPALOMAR.COM



Abraham Lincoln's Birthday
February 12
"The better part of one's life
consists of his friendships"

Chapter Directors

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Committees

Audit/ Review
Budget & Finance
Ethics & professional Conduct
Legislative
Nominating
Tax Agency Liaison

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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.**