

PALOMAR CHAPTER
ENROLLED AGENT FORUM
California Society of Enrolled Agents

FEBRUARY 2010 Issue



Date: February 17, 2010

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

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

ROUND TABLE DISCUSSION

Bring your problems and your questions
See you there and we can add our
knowledge together!

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 February 15th or
email him at RWMooreInc@aol.com

+++++

Chapter Breakfast Meeting

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

Date: Wednesday, February 24, 2010
Time: 7:30 am

Reservations are not required for Breakfast Meetings

Inside this Issue:

- 1 February Chapter Dinner
- 1 February Chapter Breakfast Meeting
- 2 Message from the President
- 2 Palomar Chapter Upcoming Events
- 2 Board Meeting Summary
- 3 Jim Stern Legislative Day
- 3 CSEA Mission Statement
- 4 Meeting Speakers
- 4 Palomar Chapter Officers
- 4 Chapter Directors

February 12
Abraham Lincoln's Birthday



Lincoln

February 14
Valentine's Day



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.*

PRESIDENTS MESSAGE
February 2010

Well Tax Season is in full swing and I am behind already. Our January meeting was a great success with a lot of good information from the Social Security and our member John Haggerty. We really had too much information and too little time. Thank you all, for making the meeting so useful to everyone.

I would like you all to go to the CSEA web site. They really have some good New Releases that they have for the public. One is on the Haitian Relief Efforts. The Congress passed legislation to allow taxpayers to give to Haitian relief efforts and write it off on 2009 taxes. It must be done before March 1, 2010. If your clients want another deduction, why not suggest this one. They can give to the <http://Clintonbushhaitifund.org> , www.opusa.org , or the American Red Cross www.redcross.org .

As you may know the IRS is going to license tax preparers in a program to get all preparers up to a minimum level of training. EA's CPA's and attorneys will be exempt from the new standards that will be implemented beginning in 2011. The 42,000 CTEC registered preparers will have three years to prove their competency by examination and meet the new standards. This will be an opportunity for CSEA to help unregistered preparers to become registered.

I wish you all a productive and profitable tax season. Remember we have a round table meeting in February and you can share your questions and problems with your fellow members. Also, I am here for you too. If you would like me to broadcast an e-mail question to our members just send me an e-mail that I can forward on to my list.

Lois Leonard, EA Palomar President

WWW.CSEAPALOMAR.COM
Check us out!

Palomar Chapter Board Minutes Summary
January 2010

- *The Treasurer's report was reviewed. It was estimated that 114 people attended the January IRS event.
- *Xavier Martinez, the Chapter's legislative representative, was introduced. Martinez attended the January 8th "Jim Stern Legislative Day" event and reported the meeting went well and our Chapter was remembered from last year. Martinez joined the PAC and Legislative committees for the upcoming year. He has PAC tickets available for anyone interested in helping the PAC committee in its endeavors. Tickets are \$10 each or 3 for \$25.00.D.
- *Hazen discussed the November and December seminars held by the chapter. Both were profitable for the organization adding roughly \$2100 to our checking balance. We have speakers for the remainder of the year except for June 2010.
- *Ellisor reported Palomar's entire member roster is on the website now. The website has also been linked to CSEA website for searches. We are still attempting to move this search feature to the front page of our chapter website. It was discussed that CSEA is developing a website for all the other Chapters – roughly \$35/month where one could "Find an EA". We currently pay roughly \$85/month for our website and its maintenance.
- *Discussion followed on the following topics of interest:
(1) the 10,000 letter campaign by the IRS, (2) surprise visits, (3) licensing of preparers and (4) EA education audits
- *R. Watts will head up the Nominating Committee for next year's officers. List of nominees must be mailed to CSEA so they can provide education to incoming officers.
- *Quickfinders were available for pickup at the evening meeting. Four (4) extra Quickfinders are available for sale if anyone is interested.

PALOMAR CHAPTER
CALENDAR OF COMING EVENTS

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



February 16
Mardi Gras

PALOMAR CHAPTER OFFICERS

President:	Lois Leonard, EA lois@leonardtax.com	760-471-4550
1st Vice President	Dee Hazen, EA deetaxlady@sbcglobal.net	760-505-9834
2nd Vice President	Richard Moore, EA rwmooresinc@aol.com	760-438-4030
Secretary:	Cheryl Kerber, EA cskerber@gmail.com	760-634-3547
Treasurer:	Nancy Dixon, EA vistadixon4@netzero.com	760-726-8490
Past President:	Ron Watts, EA rgwatts@sbcglobal.net	858-481-5809



WWW.CSEAPALOMAR.COM

Chapter Directors

Perry Collins, EA	pfc101@cox.net	858-513-7556
Calvin Ellisor, EA	cal@mlbinc.com	760-436-9044
John Haggerty, EA	haggertyea@aol.com	760-729-9528
Melanie Johnson, EA	meltax@cox.net	760-746-9891
Miles Lawrence, EA	mlawrence@lecprofgroup.com	760-438-4030
Albert Sanchez, EA	aprs@earthlink.net	951-699-1359
Selina Steele, EA	ptc@iinet.com	951-676-3443
Agi Szabo, EA	agi@taxplancenter.net	760-724-5004

CSEA Director

Ron Watts, EA	rgwatts@sbcglobal.net	858-481-5809
Joseph J Doering, EA	jjdoering@aol.com	760-489-9483



**February 2
Groundhog Day**

February 17 2010	<u>Upcoming Chapter Events</u>
March 17 2010	Round Table
April 21 2010	DARK
May 19 2010	Income/Estate Tax Update
	Stuart Simmon, Attorney, Adj Professor
	Property Tax Update
	David Butler, SD County Assessor

FORUM EDITOR
Cheryl Kerber, EA
7512 Jerez Court
Carlsbad, CA 92009-7433
Cheryl@cheathamtax.com
760-634-3547

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.**