

PALOMAR CHAPTER
ENROLLED AGENT FORUM
California Society of Enrolled Agents

MAY 2010 Issue



CSEA ★ Palomar Chapter

Date: May 19, 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
Property Tax Update
Dave Butler,
San Diego County Assessor

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
Richard Moore at 760-438-4030 by
Noon Monday May 17th or
email him at RWMooreInc@aol.com

+++++

Chapter Breakfast Meeting

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

Date: Wednesday, May 26, 2010
Time: 7:30 am

Reservations are not required for Breakfast Meetings

Inside this Issue:

- 1 May Chapter Dinner
- 1 May Chapter Breakfast Meeting
- 2 Message from the President
- 2 Palomar Chapter Upcoming Events
- 2 CSEA Mission Statement
- 3 Dave Butler—May speaker
- 4 Board Meeting Summary
- 5 Meeting Speakers
- 5 Palomar Chapter Officers
- 5 Chapter Directors



*Memorial Day
May 30*

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

May 2010

The first monthly meeting went well and I was glad to see so many of you survived tax season. I have a drawer full of extensions and a blinking light on my answering machine and papers all over my desk. Is tax time really over? I don't think so very many of you. Our business has changed so much over my 30 years of filling out forms. I started out filling out forms with pencil and paper at Block where our main reference material was Publication 17 and 334. If it was not in those publications, it did not exist!

Boy, have things changed. Now I have three computers at the office and two at home. I use the internet for information beside reference books. Now they are passing laws so fast that I struggle to keep up. My circle of "Tax" friends keep me going. Being able to go to meetings, to talk to other tax preparers, is such a big help.

My best advice is take advantage of the members of the Chapter. Don't just sit with your friends. Walk around and get to know the members. Take advantage of the Super Seminars being held in Las Vegas and Reno (I will be in Reno). Get involved in Chapter activities. We need and want to know ideas and active members.

My final piece of advice is, enjoy yourself. Take time to get to know the Chapter members, they are a great bunch of people.

Lois Leonard, EA Palomar President

WWW.CSEAPALOMAR.COM
Check us out!



Happy Mother's Day
May 9

CSEA Mission Statement

The California Society of Enrolled Agents is a progressive, professional association dedicated to serving EAs in California and abroad, enabling them to grow, prosper and lead as *The Tax Professionals* while serving taxpayers in a dynamic, rapidly changing environment with integrity and trust.

PALOMAR CHAPTER CALENDAR OF COMING EVENTS

May 2010

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

June 2010

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

July 2010

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

PALOMAR CHAPTER DINNER SPEAKER
California Society of Enrolled Agents
May 19, 2010

Escondido Country Club, Escondido, CA 6:00PM

Have you ever been asked – Should I pay additional property taxes this year? How do I get a copy of my tax bill paid? How do I get a reassessment of my property value? Who do I contact at the assessor office? Learn about the functions and policy decisions made at our local San Diego Assessor's office.

REAL ESTATE Assessments and Recordings



David Butler began working for the Assessor/Recorder/County Clerk's office in August 1976, and was recently appointed to the position of Assessor/Recorder/County clerk by the Board of Supervisors in March 2009. He is responsible for Assessor, Recorder, and County Clerk functions and policy decisions, and supervises four executive managers and 450+staff with a total budget in excess of \$58 million.

David received his Bachelor of Arts degree in social Sciences, University of California, Riverside in 1973. He is currently a member of the California Assessors' Association, California Recorders; Association, and California Association of Clerks and Election Officials.



Escondido Country Club
1800 Country Club Lane
Escondido, CA

RESERVE your space today by emailing rwmooreinc@aol.com.

HOPE TO SEE YOU THERE!

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

Chapter Directors

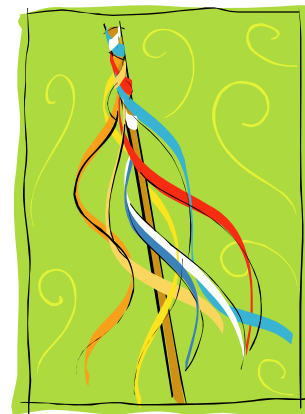
Perry Collins, EA	pfc101@cox.net	858-513-7556
Calvin Ellisor, EA	cal@mlbinc.com	760-436-9044
John Haggerty, EA	haggertyea@aol.com	760-729-9528
Melanie Johnson, EA	meltax@cox.net	760-746-9891
Miles Lawrence, EA	mlawrence@lecprofgroup.com	760-438-4030
Albert Sanchez, EA	aprs@earthlink.net	951-699-1359
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



WWW.CSEAPALOMAR.COM



**May 1
May Day**

Upcoming Chapter Events

May 19 2010	Property Tax Update David Butler, SD County Assessor
June 16 2010	Gary Quackenbush

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.**