

PALOMAR CHAPTER
ENROLLED AGENT FORUM
California Society of Enrolled Agents

JULY 2009 Issue



Palomar Chapter Dinner Meeting

Date: July 15, 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 San Diego SCORE Speakers
Applying Technology
Dick Leslie
(1 Hour)

Dinner Buffet
HR Professions,
Professionalism and
Professional Ethics
Alex Galenes
(1 Hour)

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 July 13 or
email her at
Mary.ybarra@ybarraincometax.com
+++++

Chapter Breakfast Meeting

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

Date: Wednesday, July 22 2009
Time: 7:30 am

Reservations are not required for Breakfast Meetings

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.

Inside this Issue:

- 1 July Chapter Dinner Meeting
- 1 July Chapter Breakfast Meeting
- 1 Calendar of Important Dates
- 2 Message from the President
- 2 Palomar Chapter Upcoming Events
- 3 CSEA Mission Statement
- 3 IRS—Employer Provided Cell Phones
- 3 Board Meeting Minutes Summary
- 4 Nominated Palomar Chapter Officers
- 4 Nominated Chapter Directors

Dates to Remember

July
7,8,9 IRS Forum in Las Vegas
14,15,26 IRS Forum in San Diego



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

WWW.CSEAPALOMAR.COM

Message from the President

Ron Watts will have his message to the Chapter shortly.



July 20 1969

Armstrong and Aldrin land on the Moon

Note

I noticed on the CSEA website that our Palomar Chapter Breakfast meetings were the fourth (4th) Wednesday of every month.

Sorry for any confusion!

IRS Fresno Campus Event and Tour

Dates: July 30 and July 31 2009

This is a CLOSED FORUM and attendees need to notify Ron Watts ASAP if they are interested in attending. This is a fantastic opportunity for a limited number of people. There are sessions with IRS experts in addition to a tour of the Fresno campus Submission Processing

**PALOMAR CHAPTER
CALENDAR OF COMING EVENTS**

July 2009

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

August 2009

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

September 2009

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

October 2009

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

November 2009

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

December 2009

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

**WWW.
CSEAPALOMAR.
COM**

Nominated
PALOMAR CHAPTER OFFICERS

President:	Lois Leonard, EA lois@leonardtax.com	760-471-4550
1st Vice President	Waldean Hazen, EA thazen518@aol.com	760-439-9850
2nd Vice President	Richard Moore, EA	760-442-7854
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

Jeffry Cole, EA	jeff@taxteam.com	951-308-6444
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

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

Committees

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



WWW.CSEAPALOMAR.COM



July 4, 1776 -
The [Declaration of Independence](#)
was approved by
the Continental
Congress.

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.**

A Message from the President

First of all I want to say thanks to Miles Lawrence and his crew for an interesting and informative presentation at the June dinner meeting. Miles has done a great job of bringing our group some terrific education during these past two years.

Being my last, this has been one of the more difficult Presidents' messages I have had to write. As President this past two years I have tried to lead the direction our chapter has taken in providing quality education to our members, bringing in new members, and most important, getting our EA name out to the community. There have been several changes in our chapter including the development of our website (thanks Cal), an increase in meeting attendance, and more involvement by our members.

I learned a lot this last two years about running an organization such as ours and came to realize that it doesn't run very effectively without formal committees. I thought that as long as a job needed to be done, it would be done, not realizing that if no one is assigned to do it, it probably would not be done. Our board of directors has worked hard and I greatly appreciate their time and commitment to the chapter.

This coming year we have a new president (Lois Leonard) and several new faces on the board. We have some lofty goals to accomplish including a drive to be the "Chapter of the Year".

You have elected me to serve as your new state director to CSEA and I will be a voice for our chapter. Please see my separate report "From the Directors Chair" concerning the most recent CSEA Board meeting in Torrance and subsequent meetings during the year. (September, January, and next June).

As a final note, I want to once again thank my board of directors these past two years, I have enjoyed every minute. I will have more to say at the July 15 dinner meeting. Please be there as we welcome our new board.

Thank You,

Ronald G. Watts, E.A.