

PALOMAR CHAPTER
ENROLLED AGENT FORUM
California Society of Enrolled Agents

JULY 2010 Issue



Date: July 21 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

IRS, Katie Williams—Credits, PTIN, Updates
See Page 3 for More information!

6:00 pm until 9:00 pm

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
Paula Traber at 760-744-4553 by
Noon Monday July 19th or
email her at traber@cox.net



Chapter Breakfast Meeting

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

Date: Wednesday, July 28 2010

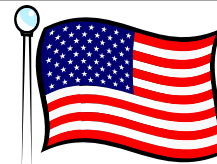
Time: 7:30 am

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
- 1 July Chapter Breakfast Meeting
- 2 Message from the President
- 2 Palomar Chapter Upcoming Events
- 2 2010-2011 Nominations
- 3 July Speaker Information
- 4 CSEA Mission Statement
- 4 Board Meeting Summary
Information on Summer speaker
- 5 Palomar Chapter Officers
- 5 Chapter Directors



**July 4
Independence Day**

**CSEA Palomar Chapter
Annual Planning Session
July 12, 2010—Monday
9:00 AM—11:00 AM
Coco's—605 W Vista Way,
Vista CA 92081**

Please plan to attend—all ideas are welcome!

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

WWW.CSEAPALOMAR.COM

PRESIDENTS MESSAGE

July 2010

There will be lots of stuff happening this month and I hope all of you, will take the time not just to come to the meetings (of course, I want all of you to do that), but to help me and the new board to make this year one our best.

Good Stuff:

Our web site: WWW.CSEAPALOMAR.COM Palomar has a reputation as the small Chapter with the great web site. But a web site is only as good as the next update. As with all things “computer”, it is in constant change. At the July 12th planning session in Vista at Coco’s (9am for breakfast), the web site will be one of the items that will be on the agenda. Blog vs. forum will be on the topics. What type of items our members are looking for in their web site? Please, if you are unable to come, – then e-mail me or a member of the board to bring your ideas.

Education: This is always the prime topic at any planning session for enrolled agents. What topics will bring members and guests to the meetings? What speakers deliver the best “bang” for your education dollar? There are many groups looking for your education dollar, but can the Chapter give you the best value? We need the members to tell us what they want.

Legislation: Enrolled Agents need information about the coming changes with licensing and “P-tin” numbers. How much will this cost? Do we have to take a test? What about our staff members? The speaker for our July 21st Chapter meeting is K. Williams from the IRS. The topic will cover these very issues.

Lois Leonard, EA – President Palomar Chapter



Peru Independence Day
July 28



Poland Liberation Day
July 22

QuickFinders

Remember—if you attend eight meetings, you may receive a FREE QuickFinder.

Those are eight meetings between December 2009 and November 2010.

Breakfast meetings, and the annual planning meeting also count toward the total.

If you attend seven meetings—you may receive a 50% discount on your QuickFinder order.

We will have an order form in the August FORUM

Nominations of Officers

Lois Leonard—President
Dee Hazen—First Vice President
Albert Sanchez—2nd Vice President
Nancy Dixon—Treasurer
Cheryl Kerber—Secretary

Board Members

Perry Collins, EA
Calvin Ellisor, EA
Melanie Johnson, EA
Miles Lawrence, EA
Frank Uram, EA
Selina Steele, EA
Agi Szabo, EA

WWW.CSEAPALOMAR.COM
Check us out!

PALOMAR CHAPTER CALENDAR OF COMING EVENTS

July 2010

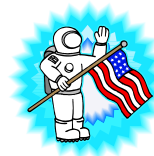
- 21 Palomar Chapter Meeting—Escondido Country Club—Escondido CA
- 28 Palomar Chapter Breakfast Meeting—Denny’s at I-5 and Carlsbad Village Drive

August 2010

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

September 2010

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



Moon Day
July 20
Man first walked
on the moon

PALOMAR CHAPTER DINNER SPEAKER
California Society of Enrolled Agents
July 21, 2010

Escondido Country Club, Escondido, CA 6:00PM

IRS- Katie Williams will be speaking on the HIRE Act, the Health Care Tax Credit for Small Business, and the Return Preparer Review Guidelines.

All tax professionals including EA's, CPA's, Attorneys as well as unenrolled preparers need to register and obtain a PTIN.

Those with PTINS need to re-register but will be re-issued the same PTIN.



Katie Williams works with the IRS in Communications, Liaison and Disclosure within SBSE as a Senior Stakeholder Liaison to the tax practitioner and small business communities. She has worked for the IRS for almost 25 years and has worked as a Revenue Agent, Tax Auditor, and now as a liaison with practitioner and small business organizations.

Katie also worked on the SBSE Design Team involved in the restructuring of the IRS back in 2001 and also worked in the Taxpayer Advocate's Office.



Escondido Country Club
1800 Country Club Lane
Escondido, CA

RESERVE your space today by emailing Paula Traber at traber@cox.net

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	Albert Sanchez, EA aprs@earthlink.net	951-699-1359
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
Melanie Johnson, EA	meltax@cox.net	760-746-9891
Miles Lawrence, EA	mlawrence@lecprofgroup.com	760-438-4030
Frank Uram, EA	feuram@aol.com	858-945-1659
Selina Steele, EA	ptc@iinet.com	951-676-3443
Agi Szabo, EA	tpc@taxplancenter.net	760-724-5004

CSEA Director

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



WWW.CSEAPALOMAR.COM



**Canada Day
July 1**



**Argentina Independence
Day—July 9**

Upcoming Chapter Events

July 21 2010—IRS, K Williams—Credits, PTIN, Updates

August 18 2010—Lisa Ihm—Client Questions

September 15 2010 - Renee Rhodda, JD—Spidell

October 20 2010—Steve Sims—FTB Update

FORUM EDITOR
Cheryl Kerber, EA
7512 Jerez Court
Carlsbad, CA 92009-7433
CSKerber@gmail.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.**