

PALOMAR CHAPTER  
**ENROLLED AGENT FORUM**  
California Society of Enrolled Agents

**AUGUST 2009 Issue**



CSEA ★ Palomar Chapter

***Palomar Chapter Dinner Meeting***

Date: August 19, 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 William Rogers  
ASCEND Business Advisory  
Group  
Ever Have Questions on  
AMT Calculations?

[See Page 2 for More Details on this Speaker!](#)

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  
Richard Moore by  
Noon Monday August 17 or  
email him at [RWMooreInc@aol.com](mailto:RWMooreInc@aol.com)  
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**Chapter Breakfast Meeting**

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

Date: Wednesday, August 26 2009  
Time: 7:30 am

Reservations are not required for Breakfast Meetings

**Inside this Issue:**

- 1 August Chapter Dinner Meeting
- 1 August Chapter Breakfast Meeting
- 2 Message from the President
- 2 Palomar Chapter Upcoming Events
- 3 CSEA Mission Statement
- 3 Board Meeting Minutes Summary
- 4 Palomar Chapter Officers
- 4 Chapter Directors



Officers and Board Members Present and Sworn in  
at the July 2009 Meeting

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

**[WWW.CSEAPALOMAR.COM](http://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.*

## Message from the President

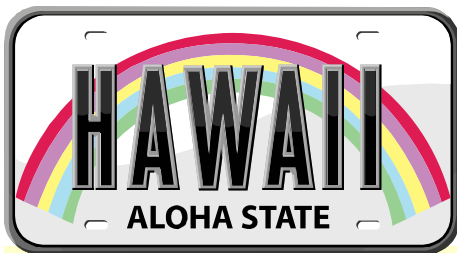
The latest budget deal reached July 20<sup>th</sup> by Gov. Schwarzenegger and the California state legislative leaders will be affecting our tax clients. They will be cutting money from our prisons, taking money from local governments, cutting money from our schools and selling off state assets. If we are coming out of the recession, all this might work, but the recession deepens it might be much worse for our clients.

What does all this mean for Enrolled Agents? We must be prepared to answer our client's questions about unemployment benefits (remember \$2,500 will be tax free), early withdrawals from IRAs, foreclosures, bankruptcies etc. I am sure that you already have clients calling with various questions concerning job losses and income reductions.

As a Chapter we can be there for each other. The networking and education that you can get from your fellow members may save the day for you and your clients. Your board of directors has been discussing ways to build the web site to answer questions posted by members. We have a wonderful start in our web site and I am hoping by next year more and more of our members will find it the place to go for their difficult questions.

I am very excited about being your new President. With my fellow officers and board of directors, I am hoping that this is the year the Palomar Chapter stands out from the other Chapters. I know with your help, we can do it!

President Lois Leonard



August 21, 1959

Hawaii Became a State

### **PALOMAR CHAPTER CALENDAR OF COMING EVENTS**

#### 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
- 30 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
- 30 Palomar Chapter Breakfast Meeting—Denny's at I-5 and Carlsbad Village Drive

#### **PALOMAR CHAPTER DINNER SPEAKERS August 19, 2009**

#### **EVER HAVE QUESTIONS ON "AMT" CALCULATIONS?**

William Rogers from ASCEND Business Advisory Group will be presenting a CASE STUDY of a taxpayer with AMT including the latest updates on tax relief provisions.

#### **"PLANNING WITH AMT"**



William E. Rogers is the founder and President of Ascend Business Advisory. He has been in the financial services industry since 1996. He is a Certified Financial Planner, a Chartered Life Underwriter, and an Enrolled Agent. He has a degree in Business & Management from the University of Redlands, and a Master in Business Administration from the University of Southern California. Mr. Rogers is Past President of the North County Chapter of the California Society of Tax Consultants and Past President of the Palomar Chapter of the California Society of Enrolled Agents.

William Rogers specializes in the financial planning needs for small businesses. He is experienced in counseling small companies in the areas of tax planning, operations management, setting up management information systems, financial planning, employee benefits, and human resource management. Moreover, he has worked with a wide variety of businesses from different industries and sizes. Over the last eight years he has developed a specialization in consulting e-commerce businesses. Thus, he has been instrumental in establishing a unique practice that supports the needs of Internet based companies. Finally, he has been a featured speaker for the Learning Annex, for the California Society of Tax Consultants, and the California Society of Enrolled Agents. Mr. Rogers is enrolled to practice before the IRS.



**HOPE TO SEE YOU THERE!**

**WWW.  
CSEAPALOMAR.  
COM**



**Nominated**  
**PALOMAR CHAPTER OFFICERS**

President:	<b>Lois Leonard, EA</b> lois@leonardtax.com	760-471-4550
1st Vice President	<b>Dee Hazen, EA</b> deetaxlady@sbcglobal.net	760-505-9834
2nd Vice President	<b>Richard Moore, EA</b> rwmooresinc@aol.com	760-442-7854
Secretary:	<b>Cheryl Kerber, EA</b> cskerber@gmail.com	760-634-3547
Treasurer:	<b>Nancy Dixon, EA</b> vistadixon4@netzero.com	760-726-8490
Past President:	<b>Ron Watts, EA</b> rgwatts@sbcglobal.net	858-481-5809

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[WWW.CSEAPALOMAR.COM](http://WWW.CSEAPALOMAR.COM)



**August 4**  
**Coast Guard Day**



**August 1**  
**Air Force Day**

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**ENROLLED AGENTS**  
**FEDERALLY RECOGNIZED TAX PROFESSIONAL**  
**THE TAXPAYERS REPRESENTATIVE.**