

PALOMAR CHAPTER
ENROLLED AGENT FORUM
California Society of Enrolled Agents

SEPTEMBER 2009 Issue



Palomar Chapter Dinner Meeting

Date: September 16, 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 Employee Benefits
HSA, IRA, 401(k)
Paychex—Caitlin Cun

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 at 760-442-7854 by
Noon Monday September 14 or
email him at RWMooreInc@aol.com
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Chapter Breakfast Meeting

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

Date: Wednesday, September 30 2009
Time: 7:30 am

Reservations are not required for Breakfast Meetings

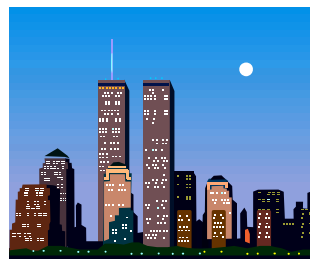
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Reminders

September 7- Labor Day

September 15 - Third installment of
quarterly estimated taxes due
and
Corporations and S-Corporations
due date if you filed an extension in
March of this year



Patriot's Day
September 11

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.*

President's Message
Lois Leonard, EA

How did you become an Enrolled Agent? Did you take a direct route to your career or was your path as twisted as mine? When I was listening to other Chapter Presidents talking about what their chapters were doing to get new members and how to encourage people to become Enrolled Agents, I was thinking about my own career path. So here it is:

High School for girls in the 60's was not encouraging girls to become doctors, but to become nurses, not school administrators, but teachers, not business executives, but wives. In my "high school" view of life I could be a nurse (giving shots and carrying bed pans), teacher (teaching 30 misbehaving kids each day), or finding some guy to support me (all the guys I knew had pimples and drove their parents' car). So, off to college I went. My cousin was an occupational therapist. As far as I knew, she gave no shots and did not have to carry a bed pan. It sounded good to me so I took that path at Ohio State. I had to take a lot of art classes and learned over and over I had NO talent. During my fourth year, I did internships at hospitals and had to face I had picked the wrong path. I finished college and passed by OT licensing test. Yes, after that EA there is an OTR, just don't tell anyone!

I decided it was people that were the problem, so I became a programmer for SD Trust and Savings Bank. After one year I crossed programming off my career list. I also crossed Real Estate agent off along the way. My first husband opened his medical office and I became his "front staff". I did the appointments, A/P, A/R, insurance forms and what ever else was needed. I wanted to cross that job off after the first month, but it took me many years before I could work my way out of that mistake.

Classes at Palomar College in accounting and taxes were fun and a lot easier than art classes. I did not see them as a career, but to build my skills in the medical office. After finding mistakes on my professionally prepared tax return, I took my first tax class at HR Block. Charlotte Hotchkiss, EA taught the class. She hired me and few others from our class to help her open a new Block office in Eastern Escondido. She checked over all our returns (it was slow the first few years), and I dreaded those redo slips clipped to the top of the returns. But with Charlotte's help, I learned and grew. After three fun tax seasons, I became an EA. I then went to work for Hayden Wisdom, EA in Poway. Hayden also was a teacher and could make taxes fun. I was starting to view being an Enrolled Agent as a career. It had just been a lot of fun before that! After that I opened my own office and 26 years later, I am still having fun!

How can our Chapter help others see that being an Enrolled Agent is a career (and fun)?

Lois

WWW.CSEAPALOMAR.COM
Check us out!

**PALOMAR CHAPTER
CALENDAR OF COMING EVENTS**

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



September 22
The first Day of Autumn

Nominated
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	760-442-7854
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

Perry Collins, EA	pfc101@cox.net	858-513-7556
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Joseph J Doering, EA	jjdoering@aol.com	760-489-9483



WWW.CSEAPALOMAR.COM



Although we relate Uncle Sam to Independence Day—The 4th of July—The first time his picture was in print was September 3 1813

Upcoming Chapter Events

October 21 2009— IRS Audits, Exams, Controversial Issues
Rich Walton, Attorney, Adjunct Professor

November 18 2009— Ethics and Death & Taxes
David Shaw, CSEA President

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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.