



# SOLANO-NAPA NEWS

CALIFORNIA SOCIETY OF ENROLLED AGENTS



“WE SPEAK TAX” - the taxpayers’ tax experts

**Volume I, Number 3**

**September, 2005**

Solano-Napa Chapter, CSEA, is proud to announce the dinner meeting, scheduled for October 25, 2005, will have as its guest speaker, Karen Brosi, EA, presenting "House Sale Myths". This meeting will be held at the *Hilton Garden Inn*, Fairfield, and there is limited seating available! It's not too early to make your reservation with Louanna Grindle, EA, fax (707)451-4866 or [taxhouse@sbcglobal.net](mailto:taxhouse@sbcglobal.net). At this meeting, we will have a drawing for a bottle of Napa Valley's finest, donated by Norman Golden. Tickets will be \$1 each. The proceeds will be used to buy our A-Frame for the sign, "What is an EA?" So, buy a lot!! See you there!

## Solano-Napa Chapter Breakfast & Dinner Programs

Solano-Napa EAs meet on the **second and fourth Tuesdays** of each month to share information with other EAs and tax professionals. The meetings are at Jack & Linda's Country Café, 2390 N Texas St., Fairfield, CA and as announced, at Jonesy's Famous Steak House, 2044 Airport Road, Napa, CA.

## President's Message

### 11<sup>th</sup> Annual IRS Town Hall Meeting

This is a great opportunity to get answers to your questions from the top. Participants are encouraged to send in question prior to the event or they can be handed in during the sessions.

Questions can be emailed to [Geraldine.Kelly-Brenner@irs.gov](mailto:Geraldine.Kelly-Brenner@irs.gov).

Heading the list of Speakers and Topics:

**Terry Franklin, the IRS Director of Examination** will open the Town Hall Meeting.

**Sheryl Stokes, Territory Manager Examination** and **Dan Castanon, Supervisory Revenue Agent Examination**, will focus on audits, including options and alternatives. Find out what is the minimum the IRS needs to know and exactly what your options are in providing it.

**Ron Danese, Insolvency Advisor, Terry Antell, Territory Manager Collection** and **Gloria Orozco, Territory Manager Collection & OIC** will lead a two hour panel discussion on Client Options including the changing Bankruptcy laws, Partial Pay, Installments and OIC.

The lunch speaker will be **Julie Parodi, Special Agent TIGTA**, presenting an overview of preparer penalties.

**Joe Calderaro, Technical Coordinator**, Collection, **Terry Antell** and **Lawrence Dorr, Appeals Officers**, Appeals will lead a panel on Penalty and Interest Abatement  
(Continued on Page 2)

### Breakfast Meetings - 7:30 am - 9:00 am:

On the second Tuesday, we have Breakfast Meetings where a predetermined topic will be discussed. All attendees are encouraged to participate by sharing their knowledge and experience. Cost is Dutch.

### Dinner Meetings:

**6:00 pm** Attitude adjustment  
**6:30 pm** Dinner  
**After dinner** Education

On the fourth Tuesday, we have Dinner Meetings where generally there will be a speaker on a topic for continuing education, practice management, legislative, or other issues pertinent to our profession. **Cost is \$30, Members and staff, \$35, non-members.**

The next dinner meeting for the Solano-Napa Chapter, CSEA, will be held on Tuesday, September 27, at 6:30 pm at Jonesy's Famous Steak House, 2044 Airport Road, Napa, CA. The speaker will be Chuck Gravette, Attorney at Law. The subject topic will be "New Bankruptcy Law".

Meal choices are:

Top sirloin steak-12 oz top sirloin  
Chicken Cordon Blue-Canadian bacon and cheese wrapped in a breast of chicken.  
Broasted Chicken-lightly breaded and deep fried under pressure.  
Shrimp Louie-bay shrimp on a bed of iceberg  
(Continued on Page 2, see Dinner)

(President's Message continued)

**Laurel Costen and Daniel Parent, Attorneys SBSE IRS Counsel**, will teach us how Circular 230 is going to affect the way we run our tax practices.

The date is **Friday, September 30, 2005**, at the **Holiday Inn** in Emeryville. To register, look for the registration in this month's issue or on the web at:

<http://www.missionreas.org/education.html>

Or call Michelle Whipple at **(415) 459-6966**.

### DO WE HAVE YOUR CORRECT INFORMATION?

When we were putting together the Chapter letterhead and roster, there were many of you who gave me corrections to your information. Since my info came from CSEA, that means that CSEA still has your old information.

Is your personal information on the CSEA Website correct? Here is how you find out.

Go to [enrolledagent.org](http://enrolledagent.org) and sign in.

Scroll down to Site Map and click.

Scroll down to My Preferences and click.

First item is My Information, click.

Is it correct? If not change it right on the screen.

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## Find an Enrolled Agent

If someone in your town wanted to find an EA, would you be the one they would find?

Go to [csea.org](http://csea.org) and on the left hand column is

### Find an Enrolled Agent

Click on it and then give the city. These were the results.

Benicia	2	Dixon	2
Fairfield	5	Napa	2
Vacaville	1	Vallejo	6

There are more of us out there. Go online and register!

Go to [csea.org](http://csea.org)

Go to the Members Area, Click and log in.

The first option is: Find an EA Online Advertising Program. Click.

You can get a free listing or you can choose to pay for a banner ad. Check it out. Next month these numbers should double.

Summer is almost over and baseball season ended here with a bang! A group of EAs and families and friends joined for dinner at Jack and Linda's Country Café and then on to Vacaville to see the Solano Thunderbirds beat the team from Oakland. Even I, the non-baseball fan had a great time and the fireworks afterwards were great! Put this on your calendar next year.

Solano-Napa hosted its first summer special on Friday, August 19, 2005. Steve Sims from FTB and Charlie (Continued on next column)

(President's Message continued)

Lyons from IRS provided us with great information and some late breaking changes.

Our final **Summer Special** is Friday, September 16, 2005. Jerry Pusateri, EA, **Home Mortgage Interest Deduction Rules**, will share the day with Frank Acuna, Attorney, **Taking Title to Real Property and Capital Gains Tax Deduction Strategies**. If you see as many refinances as I do, you have probably wondered "**Are My Clients in Compliance?**" **Join us to find out.**

Solano-Napa is working on a website with the help of other CSEA chapters. For our home page, we want something representative of Solano-Napa Chapter. If you could pick a couple of pictures to represent this area, **what would you choose? Let me know. Better yet, email me your choice(s).**

Mark October 25, 2005, on your calendar. Karen Brosi, EA will be our speaker. Many of you know her from Super Seminars. If not, you are in for a treat. She is a dynamic speaker who can put the most complicated concept into something we can all understand.

Our **Board of Directors** meet at 4:30 prior to the dinner meetings. These meetings are open to all members. Come set in on one and find out how things work. Maybe you'll find something that really interests you and you can become a part of the running of the chapter.

Anne T. Arms, EA

**President**

**Solano-Napa Chapter, CSEA**

**FTB FLASH** - According to Steve Sims, at our Summer Seminar on 8-19-05, regarding the 3 1/3 % withholding on real estate, the loop-hole has been closed and partnerships and corporations now must comply. Check out the website.

Go to [ftb.ca.gov](http://ftb.ca.gov)

Click on Tax Professionals

Scroll down to Special Taxes and Withholding

Click on Withholding requirements for real estate sales

(Dinner, continued from Page 1)

Lettuce surrounded by tomato, beets and egg.  
Thousand Island Dressing served on the side.

Dinners are \$30 for members and \$35 for non-members. There is a \$5 discount if your reservations are made timely. Reservations and meal choice are due to Louanna Grindle, EA, fax (707)451-4866 or email: [taxhouse@sbcglobal.net](mailto:taxhouse@sbcglobal.net) by Tuesday, September 20, 2005, 5 pm! PLEASE NOTE: THIS IS A NEW DINNER POLICY!

If you don't want to worry about timely reservations, this would be a perfect time to have your name added to the Standing Reservation List. (That way you only have to worry about when you aren't going to be there!)

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### *hEArD It Through The Grapevine*

Free credit reports-one each year from each of the three nationwide credit reporting agencies-are going to be available nationwide starting next month. The free credit reports may be requested through the internet (the official website is [www.annualcreditreport.com](http://www.annualcreditreport.com)) or by telephone (toll free at 877.322.8228).

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# Solano-Napa Chapter CSEA

c/o Matt Jones, EA

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**First Class Mail**

Return Service Requested



## **2005 CALENDAR OF EVENTS**

### **AUGUST**

- 6 Solano-Napa "Day at the Ballpark"  
Food @ Jack & Linda's, Fairfield  
Ballgame, & Fireworks, Vacaville
- 9 Solano-Napa Breakfast (2nd Tue.) 7:30 am  
Topic: Office Client Databases  
Jack & Linda's Country Café, Fairfield
- 19 Solano-Napa Session 2 Special Summer Seminar  
9:00 am - 1:00 pm Jack & Linda's Country Café, FF
- 23 Solano-Napa Dinner (4th Tue.) 6:00 pm  
Topic: Buying or Selling a Tax Practice  
Jack & Linda's Country Café, Fairfield
- 24-25 CSEA C-STAR FTB Representation Seminar  
The Beach Resort, Monterey, CA  
Jack & Linda's Country Café, Fairfield
- 30 CSEA/Gear Up Technology Seminar  
Crowne Plaza, Irvine, CA

### **SEPTEMBER**

- 13 Solano-Napa Breakfast (2nd Tue.) 7:30 am  
Topic: Exit Strategies  
Jack & Linda's Country Café, Fairfield
- 16 Solano-Napa Session 3 Special Summer Seminar  
9:00 am - 1:00 pm Jack & Linda's Country Café, FF
- 17-23 CSEA Tax Boat 2005, Explore Alaska
- 21-22 SEE Exam Dates
- 27 Solano-Napa Dinner (4th Tue.) 6:00 pm  
Topic: New Bankruptcy Law  
Jonesy's Famous Steak House, Napa

### **SEPTEMBER**

- 27 CSEA Tax Practice Management Workshop  
CSEA Office, Sacramento
- 29 CSEA New EA Workshop 9:00 am – 4:00 pm  
CSEA Office, Sacramento
- 30 Tax Practitioner/IRS Town Hall Meeting  
8:00 am – 5:00 pm, Holiday Inn – Bay Bridge  
Emeryville, CA

### **OCTOBER**

- 8 Solano-Napa Breakfast (2nd Tue.) 7:30 am  
Topic: OIC – Initial Considerations  
Jack & Linda's Country Café, Fairfield
- 25 Solano-Napa Dinner (4th Tue.) 6:00 pm  
Topic: House Sale Myths, Karen Brosi, EA  
Jack & Linda's Country Café, Fairfield

### **NOVEMBER**

- 8 Solano-Napa Breakfast (2nd Tue.) 7:30 am  
Topic: OIC - Process ability  
Jack & Linda's Country Café, Fairfield
- 15 Solano-Napa Dinner (4th Tue.) 6:00 pm  
Topic: BOE, Tax Auditor  
Jack & Linda's Country Café, Fairfield

### **DECEMBER**

- 13 Solano-Napa Holiday Party, 6:00 pm  
Jack & Linda's Country Café, Fairfield