



SOLANO-NAPA NEWS

CALIFORNIA SOCIETY OF ENROLLED AGENTS



"WE SPEAK TAX" - the Tax Professionals

Volume II, Number 3

May 2006

Regulation of Paid Return Preparers—a call to action

Members earlier today received an e-mail from [President Frank Degen](#) in which he asked all hands to write their senators in support of the Taxpayer Protection and Assistance Act of 2005 (S. 832). S. 832, as currently written, is strong legislation designed to protect taxpayers from incompetent and/or corrupt paid preparers. E@lert understands that there may be some pressure from those not interested in true reform to strip the bill of important measures that protect taxpayers and enhance the profession. Please lend your support to this call for meaningful and substantive reform. Once you write your senators, please drop NAEA's [Government Relations](#) department an e-mail to let us know who you wrote. (From NAEA E@lert 5/5/06).

See Frank Degen's letter as insert to this newsletter.

President's Message

The rains have stopped. The midnight oil is turned off. The office closed for a few days. Office hours are back to normal. Life is good.

Now it's time to look ahead, time to begin plans for the coming year.

We will be meeting on Saturday, May 13, 2006 at Jack & Linda's Country Café for our 2006 – 2007 Planning RetrEAt. This retrEAt is for everyone. The Board is expected to attend but we rEALLY need input from the membership. Come share your idEAs, comment on what you hEAr and help us make the coming yEAR grEAt.

Sometimes I do get carried away with EA, which is EAsy to do when you feel so strongly about an organization. Check out the calendar and plan to be a part of Solano-Napa Chapter.

Congratulations are due to nine people in the Solano-Napa area who passed the recent Special Enrollment Examine (SEE). Of those nine, the following are now members: Kathy Cranston, Napa; Lea Garrity and Tereza Avalos, Dixon; Deborah Luvisi and Betty Owings, Vacaville. Others who passed include Sylvia Marshall and Yolanda Perez from Vacaville, Satoru Mimoto from Napa, and Pamela Bolts from Fairfield. Again, congratulations!!

Anne Arms, EA
President
Solano-Napa Chapter

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.

Breakfast Meetings – 8:00 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.** 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 by 5 pm on the third Tuesday of each month.

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 give notice when you are not going to be there!) See driving directions insert.

Napa Satellite Group Luncheons

Napa Satellite Group meets on the **third Thursday** of each month. These luncheons are at the Napa Elks Club, 2840 Soscol Ave., Napa. Meetings start at the noon hour.

Lunch Meeting – Noon – 1:00 pm

Invitation is open. **Cost is \$15.** For reservations, contact Chuck Gravett's office at (707) 258-1030 and RSVP with his secretary.

Jerry Pusateri, EA is available for car pool from Fairfield.

May 5, 2006

Dear NAEA members,

I am writing to once again ask for your support for S. 832, the Taxpayer Protection and Assistance Act of 2005, a bill whose contents were greatly influenced by NAEA.

S. 832, as currently drafted, is a pro-taxpayer and pro-tax professional bill that will enhance the integrity of the tax administration system. It will make important strides in deterring and punishing abuses by individuals who exploit taxpayers and the tax system for their personal gain. It will also make important strides in protecting taxpayers from the unpleasant consequences of incompetent preparers.

Introduced by Senator Bingaman of New Mexico, the bill enjoys bipartisan support, including the chairman and ranking member of the Senate Finance Committee (Chuck Grassley and Max Baucus, respectively) as well as Senators Smith (OR), Akaka (HI), Schumer (NY), Durbin (IL), Kerry (MA), Talent (MO), Lieberman (CT), and Pryor (AR).

Not surprisingly, there are organizations and individuals who would like to weaken the strong protections currently in S.832.

There will be those who will argue that the taxpayer protection provisions of the bill are too onerous on preparers. There will be those who disingenuously argue that unenrolled preparers will be run out of business. There will be those arguing that the bill would require the unenrolled to pass a test every year (which it does not). There will be those arguing to waive in untold thousands who hold a service mark from a 'nationally recognized' organization. In short, there will be preparers who will be writing their legislators and claiming to support regulation of all paid preparers, while at the same time arguing for changes that will gut the bill and leave taxpayers high and dry.

I ask you to join me in writing the Senate to urge support of a preparer reform bill that:

- improves taxpayer access to competent and ethical tax preparation services;
- builds on existing regulatory framework and consolidates enforcement under Treasury regulations;
- ensures adequate resources for administration, promotion, and enforcement; and
- strikes a correct balance for creating a new tax practice license.

Our boilerplate letter is available [here](#) (click [here](#) for more information on how to contact your Senators). Please feel free to modify, particularly if one your Senators already co-sponsors the bill. We heard positive feedback based on our first round of grassroots letter writing last May, and I assure you that continuing the dialogue is critically important. Our thousands of members must demonstrate constituent support.

While advocating for legislation is a long slog and we still have a journey ahead of us, I am greatly encouraged by the support we have received from our members, from the encouraging words I have heard while testifying before Congress, and the position of the National Taxpayer Advocate in her recent annual reports. Rest assured that NAEA, as the only organization solely representing EAs, will have your best interests, as well as those of the American taxpayer, at heart.

Sincerely,



Frank Degen, EA
President

P.S. Click [here](#) for more details on why NAEA supports the Taxpayer Protection and Assistance Act of 2005.

SOLANO NAPA CHAPTER CSEA



ANNUAL PLANNING RETREAT

Saturday, May 13, 2006

Calling all Members of Solano Napa Chapter. Due to a scheduling conflict, our Planning Retreat has been moved to Saturday, May 13th 8:30am to 3pm.

All members are needed for this most important meeting of the year. Our purpose is to set the priorities and directions for the fiscal year 2006-2007 and beyond. Please take time out of your weekend and spend it with us. The Chapter Board needs your input and ideas. We need to hear from all of you, not just the board members. What programs do *you* feel are important? What do *you* want our chapter to be involved in? Where do *you* think we should be heading in the years to come? Come by Jack & Linda and enjoy a continental breakfast and working lunch.

Date: **Saturday May 13th**

Place: **Jack & Linda's Country Café** (2930 N Texas St, Fairfield CA)

Time: **8:30am to 2pm** (3pm for board members)

Please Respond to Alma Guenther, EA as soon as possible.

Phone: 643-2226, Fax: 643-2222, email: almaea@pacbell.net



E-Services Phone Forum Series Offered in Spring-Summer 2006

Greetings, Practitioners!

Did you know since January, 2006 that nearly **54 thousand** individuals have registered for IRS e-Services? Check out how many “online” requests for information the IRS has received since then:

- ✓ Over **24 thousand** requests for client online POA,
- ✓ Over **5 thousand** electronic account resolution inquiries, and
- ✓ Over **3.5 million** requests for electronic transcript information

And the number of those making these requests has increased by over 300% from 2005!

Who are they? They are *e-Filing* practitioners and other eligible entities that have registered for and are using the IRS’ online e-Services!

As a result of feedback received directly from practitioners like you, the IRS will offer a series of educational phone forums (seminars conducted by conference call) on registration for and use of incentive e-Services, that is, Disclosure Authorization (DA), Transcript Delivery System (TDS), and Electronic Account Resolution (EAR), as well as an opportunity to **earn Continuing Education credits**.

These free, unique and timely events will occur this May, July and August. Here’s the schedule.

| E-Services Phone Forums | |
|--|--|
| Introduction: Registration/Delegation/e-File Application (2 hours CE credit) | Incentive e-Services (DA, TDS and EAR) (3 hours CE Credit) |
| Forum 1 (May 2 nd , 1:00pm – 2:45pm pacific): Participant Access Code: 278848. | Forum 2 (May 9 th , 1:00pm – 3:30pm pacific): Participant Access Code: 378834 |
| Forum 3 (July 18 th 1:00pm – 2:45pm pacific): Participant Access Code: 143147 | Forum 4 (July 25 th , 1:00pm – 3:30pm pacific): Participant Access Code: 689537 |
| Forum 5 (August 14 th , 1:00pm – 2:45pm pacific): Participant Access Code: 766184 | Forum 6 (August 21 st , 1:00pm – 3:30pm pacific): Participant Access Code: 478194 |

If your firm *e-Filed* at least 5 federal tax returns this past season, you can save money for your clients, increase your office efficiency and take advantage now of all the great new IRS electronic products that allow **unprecedented** access to the information needed to help your clients, during notice season and beyond, in a fraction of the time it used to take.

Attend one or both forums by registering at www.atevent.com using the applicable participant access codes noted above. Create a profile on the website to identify your name, phone number and e-mail address. Use the “Company” field in the profile to identify your professional status: Attorney, EA, CPA or unenrolled preparer. CA preparers who are registered with CTEC should input their CTEC identification number. You will be given the toll-free number and a Personal Identification Number (PIN) to use with the participant access code. Dial-in 3 to 5 minutes before the forum starts using the access code and the PIN as prompted. You will be e-mailed presentation materials one day before the forum. After the forum and if you stayed on the call for the entire seminar, you will be e-mailed a letter of completion that will qualify for Enrolled Agent and CTEC continuing education credit. Credit may be available to CPAs – check with your state’s board of accountancy.

The number of phone lines is limited and reservations are on a first come, first served basis. Please register early to be sure you don’t miss out!!

Questions? Call James Kinsey at (408) 817-6842, or email to james.r.kinsey@irs.gov.

Join us for one or more of these forums and help to maintain your **competitive edge!** And, be on the look-out for future Phone Forum announcements in [Tax Pro Events](#) on IRS.gov.

Solano-Napa Newsletter May 2006

Slate for 2006 – 2007

| | |
|-----------------------|-----------------|
| President | Alma Guenther |
| Vice President | Ken Spingola |
| Secretary | Louanna Grindle |
| Treasurer | Chris Raycarft |

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| | |
|-----------------|--------------|
| Phil Correia | Leah Garrity |
| Matt Jones | Mike Klobas |
| Sherri Scarrott | Don Wulf |

CSEA Director

Jerry Pusateri

Election and Installation will be held following dinner and prior to the speaker, on Tuesday, June 27, 2006, at Jack & Linda's Country Café, Fairfield.

NAEA Partners with CSEA on Online Auction

All of NAEA members are invited to donate items for the online auction hosted by the California Society of Enrolled Agents and NAEA. Proceeds will benefit the CSEA and NAEA Scholarship funds. This is a chance to make a difference for prospective enrolled agents, as well as furthering the educational goals of current EAs. Click here for the [donation form](#) – make certain to give something that will build excitement online and create a bidding war! Click here for more information on [NAEA's scholarship program](#), and here for [CSEA's scholarship program](#). Please contact CSEA's [Cliff Weimer](#) or NAEA's [Sam Matlick](#) for more information.

Stakeholder Liaison is presenting a **FREE** phone forum on Navigating [IRS.gov](#) on May 17, 2006. Numerous resources available on IRS.gov, including the [Tax Professionals](#) main page, a demonstration of available search features and certain job aids will be reviewed.

Teleconference calls will last for approximately an hour and will include a short question and answer period. Certificates of completion will be provided to those who attend. Enrolled Agents are entitled to 1 CPE Credit; other tax professionals may qualify depending on the requirements of their organizations.

Conference Title: Navigating IRS.GOV.
Available conference times:

- Pacific Time: 10:00 AM Access Code: 695334
- Pacific Time: 2:30 PM Access Code: 857184

Please register at [AT&T Teleconference Services](#). Participants will first need to create a profile, and then return to the registration screen to register for the phone forum. Following registration, you will be assigned a Personal Identification Number (PIN) that should be used in order to join the conference. Conference dial-in number: Toll free: 1-866-216-6835
Discussion materials will be e-mailed to

registrants the day prior to the forum.
Participant information:

- Please dial in 3-5 minutes prior to conference start time.
- Enter your access code, followed by the pound (#) sign.
- Enter your Personal Identification Number (PIN), followed by the pound (#) sign.
- Your line will be placed on hold with music until conference start.

Please contact AT&T Customer Support at (800) 932-1100 if you experience any problems with registration. (Reprinted from IRS e-News for Tax Professionals)

NAEA: Our Long Survey (From E@ert 5/5/2006)

Many of our enrolled agent members received an email from Susan Zuber, NAEA's EVP, regarding the survey created by Thomson Prometric, the company tasked by IRS for the administration of the SEE. The results of this survey will be used as part of a comprehensive job analysis to determine what knowledge a candidate must have to become an enrolled agent. If you have not completed the survey, which takes about an hour, please do so by [clicking here](#). Only enrolled agents are eligible, and only one survey may be submitted per EA. E@ert believes that our members represent the best EAs in the profession – and we want to ensure that the SEE is at least as comprehensive and stringent as it has been. This is your opportunity to help. Questions regarding this survey can be directed to [Sam Matlick](#).

SUPER SEMINAR VOLUNTEERS NEEDED!

Super Seminar attendees have an opportunity that allows them to get up close with the finest speakers in the tax world. We're looking for attendees to volunteer to help with registration, write CPE online questions, and serve as introducer/escorts for our speakers at all three Super Seminar locations. See page 11 of the March/April issue of California Enrolled Agent for a form, or call the CSEA office at 800/777-2732. Thanks, and we'll see you at Supers!

Solano-Napa Officers and Directors

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hEArD It Through The Grapevine

The Napa Satellite Group will be having their May lunch at the Napa Elks Club, 2840 Soscol Avenue, Napa, on May 18th at 12 Noon. Topic will be a Round Table discussion of this past tax season's tax problems and solutions. For reservations, contact Chuck Gravett's office at 707-258-1030 and RSVP to his secretary. Cost is \$15. All Solano-Napa Members & staff are welcome. Anyone in the Fairfield area may carpool with Jerry Pusateri, EA.

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Solano-Napa Chapter CSEA

c/o Matt Jones, EA

2437 Springs Rd.

Vallejo, CA 94591-5610

First Class Mail

Return Service Requested



2006 CALENDAR OF EVENTS

MAY

- 18 Napa Satellite Group, Lunch Meeting, Napa Elks Club, 2840 Soscol Ave, Napa
Topic: Round Table Discussion of Tax Season
- 23 Solano-Napa Board Meeting, 4:00 pm
Jack & Linda's Country Café, Fairfield
- 23 Solano-Napa Dinner (4th Tue.) 6:00 pm
Topic: "Last Tax Season", Right & Wrong
- 30-31 CSEA Annual Meeting 2006, Reno Hilton, Reno, NV

JUN

- 01-03 CSEA Super Seminar 2006, Reno Hilton, Reno, NV
- 07 CSEA Audio Tax June 2006, Teleconference, Sacramento
- 13 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Topic: TBA
Jack & Linda's Country Café, Fairfield
- 15 Napa Satellite Group, Lunch Meeting, Napa Elks Club, 2840 Soscol Ave, Napa
- 15-17 CSEA Super Seminar 2006, Hilton, Waikoloa Village, HI
- 27 Solano-Napa Board Meeting, 4:00 pm
Jack & Linda's Country Café, Fairfield
- 27 Solano-Napa Dinner (4th Tue.) 6:00 pm
Topic: TBA
Jack & Linda's Country Café, Fairfield

JUL

- 11 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Topic: TBA
Jack & Linda's Country Café, Fairfield
- 20 Napa Satellite Group, Lunch Meeting, Napa Elks Club, 2840 Soscol Ave, Napa
- 25 Solano-Napa Board Meeting, 4:00 pm
Jack & Linda's Country Café, Fairfield
- 25 Solano-Napa Dinner (4th Tue.) 6:00 pm
Topic: TBA
Jack & Linda's Country Café, Fairfield

AUG

- 08 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Topic: TBA
Jack & Linda's Country Café, Fairfield
- 17 Napa Satellite Group, Lunch Meeting, Napa Elks Club, 2840 Soscol Ave, Napa
- 22 Solano-Napa Board Meeting, 4:00 pm
Jack & Linda's Country Café, Fairfield
- 22 Solano-Napa Dinner (4th Tue.) 6:00 pm
Topic: TBA
Jack & Linda's Country Café, Fairfield

Napa Satellite Group of Solano-Napa CSEA
(formerly CSATP)

INVITES YOU TO ATTEND OUR MONTHLY MEETING

DATE: May 18, 2006

TIME: 12 NOON TO 1:30 PM

PLACE: ELKS LODGE,
2840 SOSCOL AVE.,
NAPA CA 94558

SUBJECT: Round Table Discussion of Filing Season Problems And Issues.

Please make your reservation with Chuck Gravett at 707- 258-1030, by May 15th , 2006.

The Napa Satellite Group Monthly Meetings are open to all CTEC preparers, EAs, CPAs, Lawyers, Bookkeepers, Payroll Processors and any other interested parties.

For more information contact Don Wulf, EA, at 707-252-0442

NEXT MEETING: June 15th ,2006- Reserve the date. The program will be announced.