



SOLANO-NAPA NEWS

CALIFORNIA SOCIETY OF ENROLLED AGENTS



"WE SPEAK TAX" - the Tax Professionals

Volume II, Number 6

August 2006

CPE, CPE, CPE Time to Attest

Check out the CSEA website, it is a wealth of information!

Now is the time to attest to your continue education credits (CPE). Received the form from NAEA the other day and filled it out with ease. Did you know that CSEA has all your CPE received from Chapter or CSEA events? I went to the website and was able to see all my CSEA sponsored CPE clear back to May of 1999. I found this out quite by accident one day when I was trying to find something else. I wonder what else is on the CSEA website that I'm not aware of! Here are the directions to find this information:

Go to CSEA's website at www.csea.org and log in the Members Only area using your user name and password. On the left you will see a menu, go (See CPE, page 5)

President's Message

Summer is here in full measure. Now is the time to plan our CPE classes and plan for next tax season. And yes, finish those returns on extension. One thing about taxes, it never ends. There are several education events happening that will get you those CPE credits and help fund our chapter's budget.

We have 3 Mini-Seminars, presented by members of our chapter, coming up. All are four hours with 2 hours Federal and 2 hours California CPE credits. See the enclosed flyer for registration and more information. My office is handling registration for these mini seminars.

The IRS Townhall Meeting will be held in Stockton this year on September 21st. This event is put on by the 6 local chapters and they share revenues. There will be three speakers in the morning and three in the afternoon. Lunch is provided and this year there will not be a lunch time speaker. For more information, see the attached flyer. (See Prez Message, page 5)

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 Tereza Avalos, EA, fax (707) 678-1144 or email: tereza@tabertax.com 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 – 12:30 pm to 2:00 pm

Invitation is open. **Cost is \$14.** For reservations, contact Chuck Gravett's office at (707) 258-1030 and RSVP with his secretary. Make checks payable to Linda Luchsinger.

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

CSEA'S NEWEST CHAPTER
SOLANO-NAPA CHAPTER

INTRODUCES THE 2nd ANNUAL

Solano-Napa Special Summer Mini Seminars

August 18, 2006, 9:00 am to 1:00 pm

RENTAL REAL ESTATE

From Acquisition to Sale & Everything In Between

Presenters:

Phil Correia, EA & Alma Guenther, EA

September 15, 2006, 9:00 am to 1:00 pm

THE INTEREST TRACING RULES WORKSHOP

Internal Revenue Service-Regulation 1.163-8T

Personal & Rental Residence Equity Borrowing Is On The Rise.
Learn the Potential Tax Pitfalls of These Transactions &
How to Allocate Interest to the Correct Expenditures.

Presented by Gerald Pusateri, EA

October 20, 2006, 9:00 am to 1:00 pm

SCHEDULE A: RENEW NOT REVIEW

Tips & Tricks for Working Smarter not Harder,
Appearing More Knowledgeable & Generating Increased Fees.

Presented By Gerald Pusateri, EA

Registration Fee: \$80 for One Seminar, \$140 for Two, \$199 for Three
Includes Continental Breakfast

All seminars at

Jack & Linda's Country Café, 2390 N Texas Street, Fairfield, CA 94533

Registration Form on Next Page

For more information contact: Anne Arms, 707-644-9016 or ArmsPnA@aol.com

SOLANO-NAPA CHAPTER

PRESENTS
2nd Annual
**SPECIAL SUMMER
MINI SEMINARS**

9:00 am to 1:00 pm

Jack & Linda's Country Cafe
2390 N Texas Street
Fairfield, CA 94533
(707) 425-1442

Continental Breakfast
Included

Deadline: Friday prior to event

Special price for all three sessions!

1 Session **\$80**

2 Sessions **\$140**

3 Sessions **\$199**

**After deadline
price will be \$85 per session**

Special Pricing Deadline is
August 11, 2006

Registration Form

Name: _____

Address: _____

Tel: _____

Fax: _____

Email: _____

Circle number of sessions

1	2	3
\$80	\$140	\$199

Circle session(s) of choice

A B C

Credit Card: MC Visa Am Express

Card #: _____

Exp. Date: _____

Signature: _____

Mail or fax form to:

Alma Guenther, EA
Fax: (707) 643-2222
715 Tennessee Street
Vallejo, CA 94590

Questions:

Contact Anne Arms, EA
Ph: (707) 644-9016
Email: ArmsPnA@aol.com
Alma Guenther, EA
Ph: (707) 643-2226
Email: almaea@pacbell.net

BRASS TAX GROUP PROGRAM

Education for you and **\$\$\$CASH\$\$\$** for our Chapter!

This program provides an opportunity for the Chapter to raise funds while its members obtain quality CPE credits presented by renowned instructors, David Gorsich, **EA** and Michael Karll, **EA** of Brass Tax Presentations™. Here's how it works. We get 10 or more members to register for either of the presentations, Brass Tax will give back to the Chapter \$25 for each registered member. Wow, that's a great way for us to get some cash into the treasury and get quality education at the same time!! What's even better, we do not have to register for or attend at the same location. We just need 10 or more to commit to register. The following details the official rules to qualify:

Our Chapter will charge \$150 per attendee, the regular early bird registration fee. The Chapter would then send to Brass Tax only \$125 per attendee and keep \$25 per attendee as a referral fee.

Again, we must have 10 or more registered attendees. All attendees must be listed on one roster with name, address, phone number and certificate or registration number and location; however, all do not have to attend at the same location.

Early Bird Registration is July 31st for the Toolbox Program in September and October 31st for the Update Program in November/December. Get your registration and check to us by those deadlines.

You can find the dates and locations at the following link, [Brass Tax--Education for the Tax Professional](#).

If you have attended presentations given by David and Michael before, then you know the show; however, if you have not, then you will be in for a real treat while obtaining quality CPE. So, let's all get together and go. What a deal. Eight (8), or sixteen (16) hours of quality CPE at an affordable price made even more affordable because we get to keep some cash for our Chapter. Let's Go!!

(Prez Message, from page 1)

Brass Tax is putting on their annual Tax Tools Seminar and also there Update Seminar. See the enclosed flyer for more details. A great way for the chapter to provide education to our members without involving hours of volunteer time and all the expenses associated with putting on a seminar. My office is also handling the registration for this event.

A reminder: order your Quickfinders now. Your order must be in to Peggy Elliott by our next dinner meeting on August 22nd. She needs your name, email address and how many Quickfinders for Individual and/or Business.

Summer is about fun too! Check out the flyer regarding Sacramento Valley Chapters **EA Day** with the River Cats. Enjoy a day at the ballpark including fireworks. I'm going and hope to see you there.

Alma V Guenther, **EA**
President, Solano-Napa Chapter CSEA

CSEA Board of Directors Meeting, July 1 & 2 (As reported by Jerry Pusateri, CSEA Director)

Other than normal housekeeping activities, the following actions were taken by the CSEA Board of Directors:

1. The Membership & Chapter Development Committee recommended that the Board confer Honorary Membership to William Sprague, CMP. The motion passed.

Commentary: Bill Sprague was the original Executive Vice President of CSEA. He held the position until retiring. He basically ran the organization from a spare bedroom in the early days. He had voiced an interest in being able to keep up with the activities of our organization through use of the website. Many of the old guard (including myself) wanted to honor him; thus the conferring of honorary membership.

2. The Board approved the bid of the Sacramento Valley Chapter to host the 2008 Annual Meeting.

Other CSEA actions:

CSEA Membership Committee Projects

1. New Member Orientation DVD.
2. Disaster Preparation/EA Practice Protection Plan, i.e. our Chapter's PPMED.
3. On-Hold EA Phone Message.
4. Co-op News Ads.
5. Possible revamp of the Find an EA area of CSEA website.

CSEA PIA Committee Projects

1. Continue the Client Tax Newsletter that appears in the CSEA Magazine
2. Exploring the feasibility and cost of securing trademarks for "EA, The Tax Professional" and EAs, the Tax Professionals".

CSEA Scholarship Committee

1. The Scholarship Internet Auction raised proceeds of \$5,822.
2. The Scholarship Fund's donations from sales of Quickfinders were \$7,941.

(CPE from page 1)

down to [Member Tools](#), [Preferences](#) and click on [My Information](#). Click [Continue](#) and log in again. Click on [Continue](#) again and then [Click here for other options](#). You will see several options here: View my address, Change my password, View my active committees, View my committee history, View my recent purchases, Modify my record, Change my company name, and lastly View my continuing education credits. Highlight the option and click [Go](#) and there you are!

If you do not have a user name and password, you will need to set it up. You just login in and click on [Forgot Your Password](#). Provide the information requested and a password will be send via email. You then can either keep that password or change it to one you can remember.

From Alma Guenther and Anne Arms

Wow, what a great tool and yet another great benefit of membership in CSEA!!!!

Solano-Napa Officers and Directors

President	Alma Guenther, EA 707 643-2226 almaea@pacbell.net	Directors	Phil Correia, EA 707 426-0920 pcorreia@sbcglobal.net
1st Vice President	Ken Spingola, EA 707 553-2645 kspingola@sbcglobal.net		Matt Jones, EA 707 557-6868 mattstax@sbcglobal.net
Secretary	Louanna Grindle, EA 707 451-7611 taxhouse@sbcglobal.net		Mike Klobas, EA 707 449-8146 mklobas@pacbell.net
Treasurer	Chris Raycraft, EA 707 428-4741 craycraftea@sbcglobal.net		Lea Garrity, EA 707 386-3390 leagarrity@charter.net
CSEA Director	Gerald Pusateri, EA 707 426-4396 untaxit@pacbell.net		Donald Wulf, EA 707 252-0442 dwulf@calltpac.net
Immediate Past President	Anne Arms, EA 707 644-9016 armspna@aol.com		Sherri Scarrott, EA 707 426-9472 eataxldy@pacbell.net

Chapter Committee Chairs

AUDIT

Phil Correia, EA
707 426-0920
pcorreia@sbcglobal.net

SEMINAR/SITE

Sherri Scarrott, EA
707 426-9472
eataxldy@pacbell.net

NOMINATING

Peggy Elliott, EA
707 421-8088
peggye@aol.com

PUBLIC AWARENESS

Lillian Meyers, EA
707 935-1124
lilmeyers@aol.com

BYLAWS

Lea Garrity, EA
707 386-3390
leagarrity@charter.net

BREAKFAST FACILITATOR

Mike Klobas, EA
707 449-8146
mklobas@pacbell.net

MEMBERSHIP

Gerald Pusateri, EA
707 426-4396
armspna@aol.com

RESERVATIONS

Tereza Avalos, EA
707 678-1144
tereza@tabertax.com

Preservation of Practice due to Medical Emergency

Mike Klobas, EA or Death (PPMED)
707 449-8146
mklobas@pacbell.net

FINANCE & BUDGET

Doug Ellis, EA
707 448-1407
dellisea@pacbell.net

NEWSLETTER

Matt Jones, EA
707 557-6838
mattstax@sbcglobal.net

hEArD It Through The Grapevine

Congratulations to Lea Garrity, EA and JoAnn Jones-Grimes as Solano-Napa Chapter Education Scholarship Award recipients. Keep up the good works!

Newsletter Editor: Matthew J. Jones, EA

Phone: (707) 557-6838

Fax: (707) 557-7702

Address: 2437 Springs Rd., Vallejo, CA 94591-5610

E-mail: mattstax@sbcglobal.net

Co-Editor: Alma Guenther, EA

Phone: (707) 643-2226

Fax: (707) 643-2222

Address: 715 Tennessee St., Vallejo, CA 94590-4506

E-mail: almaea@pacbell.net

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

AUG

- 02 CSEA Audio Tax Session 11 am – 12 pm “FTB e-Services”, Sean McDaniel, FTB e-Services Program
See CSEA website for more.
- 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, 12:30 pm
- 18 **Solano-Napa Special Summer Mini Seminar**
Topic: Rental Real Estate, 9:00am – 1:00pm
Jack & Linda’s Country Café, Fairfield
- 22 Solano-Napa Board Meeting, 3:30 pm, Elks Club, Napa
- 22 Solano-Napa Dinner (4th Tue.) 6:30 pm
Kiddie Tax Update, Elks Club, Napa
- ### **SEP**
- 12 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Topic: TBA
- 14 Napa Satellite Group, Lunch Meeting, Napa Elks Club, 2840 Soscol Ave, Napa, 12:30 pm
- 15 **Solano-Napa Special Summer Mini Seminar**
Topic: The Interest Tracing Rules
Workshop, 9:00am – 1:00 pm
Jack & Linda’s Country Café, Fairfield

- 21 IRS Town Hall Meeting, 8:30 am – 4:30 pm
Stockton
- 22 CSEA CA Liaison Meeting, Lion’s Gate Resort
Sacramento
- 23-24 CSEA Board Meeting, Lion’s Gate Resort
Sacramento
- 26 Solano-Napa Board Meeting, 4:00 pm
Jack & Linda’s Country Café, Fairfield
- 26 Solano-Napa Dinner (4th Tue.) 6:00 pm Topic:
Choice of Entities
Jack & Linda’s Country Café, Fairfield
- ### **OCT**
- 10 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Topic: TBA
- 19 Napa Satellite Group, Lunch Meeting, Napa Elks Club, 2840 Soscol Ave, Napa, 12:30 pm
- 20 **Solano-Napa Special Summer Mini Seminar**
Topic: Schedule A: Renew Not Review,
9:00am – 1:00pm, Jack & Linda’s Country
Café, Fairfield
- 24 Solano-Napa Board Meeting, 4:00 pm
Jack & Linda’s Country Café, Fairfield
- 24 Solano-Napa Dinner (4th Tue.) 6:00 pm Topic:
TBA
Jack & Linda’s Country Café, Fairfield