



SOLANO-NAPA NEWS

CALIFORNIA SOCIETY OF ENROLLED AGENTS



"WE SPEAK TAX" - the Tax Professionals

Volume II, Number 10

December 2006

Chapter Holiday Party & Special Bylaws Vote

6:00 pm, Tuesday, December 12, 2006
Jack & Linda's Country Café, Fairfield
Just a few minutes for vote on By-Laws change, see Notice from Board later, then....

PARTY!!!!
FOOD, FUN!!!
WHITE ELEPHANTS!!!
MORE FUN, FUN, FUN!!!

President's Message

December is a time to be with family and friends, sharing food, gifts, and stories. A time to reflect on all that is right, and all that we have to be grateful for. So join us, our Chapter family and friends at our special holiday meeting on Tuesday, December 12th at Jack and Linda's in Fairfield. There will be no breakfast meeting and no regular chapter meeting this month; however, this meeting is also special because we have a Bylaws change that needs to be approved by the membership, and it requires 10% of our members to be present. (More details available later in this newsletter.) For our **Holiday Party**. Bring a gift or two to share in our White Elephant Gift Exchange.

If I can get my act together, you might even catch a glimpse of our Chapter Scrapbook.

It is also time to get ready for our busy season to come. Order those 1099s and W2s for the year end reporting. Take an inventory of the supplies you will need during tax season. Get out those client letters, newsletters, organizers, and make appointments. I have already had clients call to make an appointment. Maybe this year I will start pre-booking client appointments.

It is also time to look at your enrollment card. What is your expiration date? Does your Social (See Prez Message, page 3)

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 other locations in the Solano-Napa area.

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 12:30 pm.

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.

- - - *WIN* - - -
- - *FREE SUPER SEMINAR* - -

SOLANO NAPA CHAPTER, in the small chapter category, had the largest increase in membership, 2005 - 2006.

With that honor comes a free SUPER SEMINAR Registration.

There will be a drawing at the dinner meeting,
on Tuesday, February 27, 2007.

Tickets may be purchased for \$10.

Or

You will receive one ticket for each Solano Napa function you attend beginning November 1, 2006. This includes:

Breakfast in Fairfield - 2nd Tuesdays

Lunch in Napa - 3rd Thursdays

Dinner in both locations - 4th Tuesdays

Holiday Party - Tuesday, December 12, 2007

Or

Sponsor a new member by February 15, 2007, and receive 5 tickets

Or

Win the dinner drawing and trade for 3 tickets

Need not be present to win. Registration may be in Reno or Las Vegas.

Early Bird deadline is March 15, 2007

Questions? Order by mail? Call - Anne Arms - (707) 745-1040

1075 First St, Suite 6, Benicia, CA 94510

(Prez Message)

Security Number end in 0, 1, 2, or 3? If so, this is the year for you to renew your enrollment. Form 8554 is available on the IRS website.

Reading other chapter newsletters can be informative. November issue of East Bays Bulletin had an article by Duncan Sandiland, EA. He participated in the phone forum on the AUR program. Here is an excerpt: "And the big bombshell: As far as AUR is concerned (and I followed up on this with Gerry Kelly-Brenner of IRS), we do NOT need to list every single transaction on a Schedule D. All we have to do is list one line with the totals from each 1099-B, indicate we have backup, and actually have the backup! How's that for a timesaver! It was also pointed out that as long as the gross proceeds totals on the Schedule D match the 1099-Bs, the computer never picks up the fact that there is no detail on the Schedule D and so it never comes to the attention of AUR." Yes indeed Duncan, this is timely information.

Happy Holidays to all of you!

Alma Guenther, EA, President

**From our Board of Directors:**

The Bylaws Committee recommends and the Board of Directors approved the following changes to our chapter Bylaws at the board meeting dated September 26, 2006:

Section 5.01 currently reads:

Officers. The officers of the Chapter shall be a President, a Vice President, a Secretary, a Treasurer and an Immediate Past-President, each of whom shall be a member of the Chapter. The officers shall have such authority and responsibility customary for their office and in accordance with the law, Bylaws, procedures and policies of the Chapter. Each officer is considered to be a member of the Board of Directors.

Proposed change:

**Article V
OFFICERS**

5.01 **Officers.** The officers of the Chapter shall be a President, a 1st Vice President, 2nd Vice President, a Secretary, a Treasurer and an Immediate Past-President, each of whom shall be a member of the chapter. The officers shall have such authority and responsibility customary for their office and in accordance with the law, Bylaws, procedures and policies of the Chapter. Each officer is considered to be a member of the Board of Directors.

We will vote on this proposed change at our Holiday Party, Tuesday, December 12, 2006. So, we not only need you there for the **big fun**, but also, for the vote on this Bylaws change.

Opportunity for Tax Professionals

PROVIDE GUIDANCE TO EMPLOYERS

RECEIVE FEDERAL EMPLOYMENT TAXES TRAINING

NETWORK WITH NEW AND EXISTING BUSINESS OWNERS

REFINE YOUR PRESENTATION AND PUBLIC SPEAKING SKILLS

MARKET YOUR PROFESSION AND ORGANIZATIONS

The Stakeholder Liaison field office of the Internal Revenue Service and the Taxpayer Education and Assistance office of the Employment Development Department began pooling resources in its employment tax outreach efforts in 2001. The overall objective of this collaboration was to better educate the Small Business Self-Employed taxpayers in the area of employment taxes by creating a "one-stop" approach to employment tax outreach. In the past three years, we have reached over **8500** California businesses providing them payroll tax seminars.

To achieve this success we have:

- Developed PowerPoint Presentations
- Created a "Practical (and comprehensive) Example" to aid the understanding and application of Fed and State payroll taxes
- Developed industry specific materials for the construction and cosmetology communities
- Developed the Employment Status Course, a highly interactive course to explain statutory and common law employment as it is applied by EDD and the Internal Revenue Service (IRS).

While this collaboration has been a very successful, realities have presented themselves prompting retooling of the existing outreach model. We need qualified and motivated professionals to help educate the public.

Therefore, we are asking you to join us in this educational quest. The IRS will provide technical training and resource materials to those Tax Professionals that wish to volunteer to be a part of our instructor cadre. We are excited about the possibility of partnering with you and/or your professional organization to bridge the gap between the employer community, Tax Professionals, IRS and EDD.

Two Day Training Session January 11th (9:00am to 3:30pm)
and
January 12th (9:00am to 3:30pm)
Small Business Administration
455 Market Street, 6th Floor
San Francisco, California

This opportunity is open to any tax professional who has a desire to assist the small business/self-employed community. No prior experience in employment taxes or payroll is required. There is no financial obligation. Your participation is based on your schedule and availability. If you think this is something you and/or your colleagues are interested please RSVP by completing the attached registration form

and return it by e-mail or fax as soon as possible, space is limited. For further information please contact: Celeste

Neal (Office) 510 637-2171 (Fax) 510 637-2434

(E-mail) Celeste.Neal@irs.gov

Solano-Napa Holiday Party Tuesday, December 12, 2006

A ***Holiday Party*** for EA's, spouses, significant others and family members will be the theme of our December 12th meeting.

Bring a wrapped white elephant gift (for our gift exchange) and food donation for St Mark's Lutheran Church who operates a food pantry. Suggestions for this year include any extra 2007 Calendars (you know the ones you get from your dentist, car mechanic, etc), grocery gift certificates for \$10 and/or a turkey, canned vegetables, canned cranberries, canned fruit, canned yams or sweet potatoes, canned olives, stuffing mix, fresh potatoes, apples, oranges, and 5 lb bags of rice. The Church is hoping to fill between 170-180 Christmas baskets.

Social hour with snacks will begin at 6:00 pm. Dinner and entertainment starts at 7:00 pm. A special performance of magical mayhem will be provided by our own ***Spingola the Great***. If you haven't attended one of our past Holiday parties, you have missed a fun evening! Do not miss out again. Please plan on joining us!

There will be no CPE or speaker at this meeting, just come and enjoy a time of celebration with fellow EAs. The site for the meeting will be Jack & Linda's Country Café, 2390 N. Texas St., Fairfield.

Dinner choices are Jack's famous steak or salmon. Your dinner choice and reservations are due to Tereza@tabertax.com by 5:00 pm, Tuesday, December 5, 2006. Cost is \$30 for members/\$35 for non-members with a \$5 discount for timely reservations.

Additionally, if you have been wondering what to do with all those little shampoos/lotions/etc that you have been collecting from hotel stays, there is a need for those items by Travis AFB Hospital which will give them to returning wounded soldiers, who are usually only at Travis for one night....Sherri will be collecting whatever you can give to take to the hospital.

Any questions can be directed to the Social Director: Jerry Pusateri, EA at untaxit@pacbell.net

Happy Holidays!

C \$ E A I N A C T I O N

JIM STERN LEGISLATIVE DAY 2007!

Legislative Day 2007, your opportunity to...

- Represent the Enrolled Agent profession at the State Capitol
- Improve your understanding of CSEA's legislative activities



- Learn about the legislative process
- Visit with legislators or legislative staff (CSEA will schedule visits for you).

EVENT:

January 5, 2007
 11:30 a.m. – 3:30 p.m., 11:00 a.m. registration
 Lunch provided
 \$35 until December 24, \$45 thereafter
 No refund for cancellations received after December 1

HOTEL:

Holiday Inn Sacramento Capitol Plaza
 300 J Street
 Sacramento, CA 95814
 916/446-0100
 Room rate: \$104 single; \$114 double (plus tax)
 Parking fee not included

REGISTER FOR THIS EVENT TODAY!

Register online at www.csea.org/events

REGISTRATION

NAME _____ LICENSE # _____

COMPANY _____

ADDRESS _____

CITY/STATE/ZIP _____

DAYTIME TELEPHONE _____ EMAIL _____

MAIL TO:
 CSEA, 3200 Ramos Circle,
 Sacramento, CA
 95827-2513

OR FAX TO:
 916/366-6674

Who are your Legislators?

Please provide us with your home address so we can match you with your legislators and make appointments for you.

ADDRESS _____

CITY/STATE/ZIP _____

CHECK HERE IF YOU REQUIRE A SPECIAL MEAL OR OTHER ACCOMMODATION (PLEASE EXPLAIN)

PAYMENT INFORMATION

Total Amount Due _____

Visa MasterCard AMEX Check Enclosed

CREDIT CARD # _____ EXP. DATE _____

CARDHOLDER'S SIGNATURE _____

CARD BILLING ADDRESS IF DIFFERENT THAN ABOVE _____

OFFICE USE ONLY		
SACO	BATCH	\$

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
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NEWSLETTER

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hEArD It Through The Grapevine

Increase Dinner Meeting Prices

Effective January 2007

Members and staff **\$35**

Non-members **\$40**

Members with Standing

**Reservations or timely RSVP
receive \$5 discount for \$30 cost.**

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First Class Mail

Return Service Requested



2006-2007 CALENDAR OF EVENTS

DEC

- 06 CSEA, Audio Tax – **Federal Tax Update**, 1 Hr. Register at www.csea.org/events
- 12 Solano-Napa **Holiday Party and Special Meeting**, 6:00 pm, Jack & Linda's Country Café, Fairfield
- ### **JAN**
- 03 CSEA, Audio Tax – **California Tax Law**, 1 Hr. Register at www.csea.org/events
- 05 **Legislative Day** in State Capitol, Capitol Plaza Holiday Inn, Sacramento
- 06-07 CSEA Board Meeting in Sacramento, 8:00 am
- 09 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Jack & Linda's Country Café, Fairfield
Topic: **What do you do when client improperly classifies independent contractor?**
- 18 Napa Satellite Group, Lunch Meeting, Napa Elks Club, 2840 Soscol Ave, Napa, 12:30 pm
- 19 CSEA/IRS **Practitioner Seminar**, 7 Hrs.
Pleasanton, CA Register at www.csea.org/events
- 23 Solano-Napa Board Meeting, 4:00 pm
Solano-Napa Dinner (4th Tue.) 6:00 pm Topic: **Expatriates Taxation**, Jack & Linda's Café, Fairfield

FEB

- 27 Solano-Napa Dinner (4th Tue.) 6:30 pm
Tax Panel Discussion
Jack & Linda's Country Café, Fairfield

MAR

- 27 Solano-Napa Dinner (4th Tue.) 6:30 pm
Tax Panel Discussion
Elks Club, 2840 Soscol Ave, Napa

APR

T.G.I.O. Luncheon, date and location TBA

MAY

- 08 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Jack & Linda's Country Café, Fairfield
- 17 Napa Satellite Group, Lunch Meeting, Napa Elks Club, 2840 Soscol Ave, Napa, 12:30 pm
- 31 CSEA, **Super Seminar**, Grand Sierra Resort & Hotel, Reno, NV

JUN

- 01-02 CSEA, **Super Seminar**, Grand Sierra Resort & Hotel, Reno, NV
- 11-13 CSEA, **Super Seminar**, South Point Hotel & Casino, Las Vegas, NV, **Session A**
- 12 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Jack & Linda's Country Café, Fairfield
- 14-16 CSEA, **Super Seminar**, South Point Hotel & Casino, Las Vegas, NV, **Session B**
- 26 Solano-Napa Board Meeting, 4:00 pm
Solano-Napa Dinner (4th Tue.) 6:00 pm Topic: