



# SOLANO-NAPA NEWS

CALIFORNIA SOCIETY OF ENROLLED AGENTS



*"WE SPEAK TAX"* - the Tax Professionals

**Volume II, Number 11**

**January 2007**

## Happy New Year!

Next dinner meeting is Tuesday, January 23, 2007, 6:00pm at Jack & Linda's Country Café, Fairfield. Speaker will be Irene Lawrence, EA, and President of CSEA, who will discuss "Ex Pats". See you there.

Remember, dinner price increase starts this month. See "hEArD It Through The Granevine" later in this edition.

### President's Message

I hope that all of you had a wonderful holiday. It is always fun to do things with family and friends. Looking back on 2006, we had a lot to be thankful for. You the members have contributed to a fine year for Solano Napa Chapter. Here is to another good year.

Are we ready for tax season 2007? Check those computers and software.

Get everything loaded and ready to go. There are still some seminars to attend. North Bay Chapter has a January Update Seminar on January 12<sup>th</sup>. CSEA has an audio tax scheduled dealing with California conformity to the latest federal tax law changes. The Lacerte Users group meets on January 13<sup>th</sup> at Jack and Linda's in Fairfield. Contact Peggy and let her know you are coming.

The Quick Finders have arrived and are in my office in Vallejo. I will be going to various meetings in January and will be sure to have them in my car. If you want to (See Prez, page 2)

### 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](mailto: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.

(Prez Message)

get yours earlier, either come to my office or make some other arrangements.

I will be at:

Solano Breakfast at Jack & Linda's on Tuesday Jan 9<sup>th</sup>.

January Update Seminar in San Rafael on Friday Jan 12<sup>th</sup>.

Lacerte User Group at Jack & Linda's on Saturday Jan 13<sup>th</sup>.

Napa Lunch at Elks Club on Thursday Jan 18<sup>th</sup>.

Solano Napa meeting at Jack & Linda's on Tuesday Jan 23<sup>rd</sup>.

See you at the various meetings in January.

Alma Guenther, **EA**, President



**--- 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

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

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**Lacerte User Group** will be meeting:

January 13, 2007

9:00am till 1:00pm

Jack & Linda's Country Cafe

2390 N. TEXAS STREET

FAIRFIELD, CA 94533

**Come early for no-host breakfast.**

Let us know if you are planning to attend and if you will need to be paired with someone who has a laptop if you do not have one. We need to be able to tell Jack and Linda how many to set up for.

If you have any questions or problem's you would like to have covered please e-mail to: [peggye@aol.com](mailto:peggye@aol.com) prior to the meeting.

# Solano-Napa Officers and Directors

<b>President</b>	<b>Alma Guenther, EA</b> 707 643-2226 <a href="mailto:almaea@pacbell.net">almaea@pacbell.net</a>	<b>Directors</b>	<b>Phil Correia, EA</b> 707 426-0920 <a href="mailto:pcorreia@sbcglobal.net">pcorreia@sbcglobal.net</a>
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<b>CSEA Director</b>	<b>Gerald Pusateri, EA</b> 707 426-4396 <a href="mailto:untaxit@pacbell.net">untaxit@pacbell.net</a>		<b>Donald Wulf, EA</b> 707 252-0442 <a href="mailto:dwulf@calltpac.net">dwulf@calltpac.net</a>
<b>Immediate Past President</b>	<b>Anne Arms, EA</b> 707 644-9016 <a href="mailto:armspna@aol.com">armspna@aol.com</a>		<b>Sherri Scarrott, EA</b> 707 426-9472 <a href="mailto:eataxldy@pacbell.net">eataxldy@pacbell.net</a>

## Chapter Committee Chairs

### AUDIT

Phil Correia, EA  
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[pcorreia@sbcglobal.net](mailto:pcorreia@sbcglobal.net)

### SEMINAR/SITE

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### NOMINATING

Peggy Elliott, EA  
707 421-8088  
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### PUBLIC AWARENESS

Lillian Meyers, EA  
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### BYLAWS

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### BREAKFAST FACILITATOR

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707 449-8146  
[mklobas@pacbell.net](mailto:mklobas@pacbell.net)

### MEMBERSHIP

Gerald Pusateri, EA  
707 426-4396  
[armspna@aol.com](mailto:armspna@aol.com)

### RESERVATIONS

Tereza Avalos, EA  
707 678-1144  
[tereza@tabertax.com](mailto:tereza@tabertax.com)

### Preservation of Practice due to Medical Emergency

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

### FINANCE & BUDGET

Doug Ellis, EA  
707 448-1407  
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### NEWSLETTER

Matt Jones, EA  
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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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# Solano-Napa Chapter CSEA

c/o Matt Jones, EA

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Vallejo, CA 94591-5610

**First Class Mail**

Return Service Requested



## **2006-2007 CALENDAR OF EVENTS**

### **JAN**

- 03 CSEA, Audio Tax – **California Tax Law**, 1 Hr.  
Register at [www.csea.org/events](http://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 (2<sup>nd</sup> Tue.) 8:00 am  
Jack & Linda's Country Café, Fairfield  
Topic: **What do you do when client is audited?**
- 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](http://www.csea.org/events)
- 23 Solano-Napa Board Meeting, 4:00 pm  
Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:00 pm Topic:  
**Expatriates Taxation**, Jack & Linda's Café,  
Fairfield

### **FEB**

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

### **MAR**

- 27 Solano-Napa Dinner (4<sup>th</sup> 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 (2<sup>nd</sup> 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
- 22 Solano-Napa Board Meeting, 3:30 pm  
Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:30 pm Topic:  
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 (2<sup>nd</sup> Tue.) 8:00 am  
Jack & Linda's Country Café, Fairfield
- 14-16 CSEA, **Super Seminar**, South Point Hotel &  
Casino, Las Vegas, NV, **Session B**
- 20 CSEA Annual Meeting, Hosted by Channel  
Island Chapter, Ventura Beach Marriott, Ventura,  
CA
- 26 Solano-Napa Board Meeting, 3:30 pm  
Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:30 pm Topic: