



# SOLANO-NAPA NEWS

CALIFORNIA SOCIETY OF ENROLLED AGENTS



*"WE SPEAK TAX"* - the Tax Professionals

**Volume II, Number 12**

**February 2007**

## Got a Tough Tax Question???

Bring it to our next Dinner Meeting at Jack & Linda's Country Café, Fairfield. Tuesday, February 27, 2007. 6:30 pm. This is the first of our two **Tax Season Tax Panel Discussions** with Internal Revenue Representative, Joe Calderero.

There is always good information gotten from these meetings. So bring your tough questions, and get good answers.

## President's Message

This will be the last you hear from me until May. One last column to keep you informed before we go into the Tax Season. There have been some additions to our Board of Directors. We amended our Bylaws to add the position of 2<sup>nd</sup> Vice President. Sherri Scarrott, **EA**, has been appointed to that position for the remainder of this fiscal year. Tereza Avalos, **EA**, has stepped into Sherri's Director position.

In May, we will be having our elections of new Officers and Directors. The installation of those Officers and Directors will occur at the June meeting. Last year with the election, installation and speaker, the May meeting ran very long. So, to avoid that, the Board decided to split the election and installation between two meetings. We are looking forward to new Board members, and I am looking for additional individuals to help out in the different committees.

Even though Tax Season is upon us, there are still opportunities to network with your fellow **EAs** and other tax professionals. The Fairfield breakfast meetings and Napa lunch meetings will continue. There will be a Tax Panel in Fairfield this month and a Tax Panel in Napa in March. Both of the panels will have Joe Calderero in attendance to give us the latest IRS scoop. Come to any or all of

## 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:

<b>6:00 pm</b>	<b>Attitude adjustment</b>
<b>6:30 pm</b>	<b>Dinner</b>
<b>After dinner</b>	<b>Education</b>

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 \$35, Members and staff, \$40, 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.

these meetings to get your tax time questions answered. Sometimes you just need someone else's input or just some support for the position you are taking. Encourage your fellow tax professionals to join us. We are a chapter that wants to include all tax professions, **EAs**, CPAs and California Registered Preparers, CTECs. There is room for us all. Solano-Napa Chapter of CSEA strives to reach out and provide quality programs and education to all in our area and beyond.

This newsletter will be going to all **EAs**, member and non-member plus California Registered Preparers. Come and join us. During Tax Season, we will also be conducting a PIA (Public Information Awareness) campaign in local newspapers. We want the Solano and Napa public to know that our members are available to assist them in all their tax needs during tax season and afterwards.

Have a gr**EA**t tax s**EA**son!!!

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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#### **From Internal Revenue Service: Are Your Online Auction Sales a Trade or Business?**

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If you are an online auction seller, you may be subject to liabilities for [income tax](#), [self-employment tax](#), [employment tax](#) or [excise tax](#). Your sales may result in [capital gains](#), nondeductible personal losses, or you may have [ordinary business income](#). The IRS has information available online to [help sellers understand their responsibilities](#).

#### **Make Sure You Know the Rules for Deducting Travel, Entertainment and Gift Expenses**

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Since last summer we have been issuing a series of fact sheets on areas that IRS data shows small businesses and self-employed persons need to pay special attention when preparing federal tax returns.

The latest one explains the [rules for deducting travel, entertainment and gift expenses](#).

The [previous seven fact sheets](#) on topics such as cost of goods sold, office in the home, car and truck expenses, and depreciation are available on [IRS.gov](#).

**This is an open invitation to all CTEC and other tax professionals to join our chapter:**

January 24, 2007

Dear Business Professional:

**President:**

Alma Guenther, EA  
 (707) 643-2226; Fax (707) 643-2222  
 e-mail: [almaea@pacbell.net](mailto:almaea@pacbell.net)

**1st Vice-President:**

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 (707) 553-2645  
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**2nd Vice-President**

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Don Wulf, EA  
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 Email: [dwulf@calltpac.net](mailto:dwulf@calltpac.net)

**CSEA Director**  
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 (707) 426-4396 Fax: (707) 426-4397  
 e-mail: [untaxit@pacbell.net](mailto:untaxit@pacbell.net)

**IPP**  
 Anne Arms, EA  
 (707) 745-1040; Fax: (707) 745-0281  
 email: [armspna@aol.com](mailto:armspna@aol.com)

The Solano-Napa Chapter of the California Society of Enrolled Agents would like to inform you of our upcoming and continuing meetings. The meetings are open to all tax, bookkeeping, payroll, accounting, legal and financial business professionals with an interest in taxation.

**Breakfast Meetings – 8:00 am – 9:00 am:** On the second Tuesday of each month Solano-Napa EAs meet to share information with other EAs, tax professionals, and interested parties. They are Breakfast Meetings where a predetermined topic will be discussed. All attendees are encouraged to participate by sharing their knowledge and experience. The meetings are at Jack & Linda's Country Cafe, 2390 N. Texas Street, Fairfield, CA and, as announced, at other locations in the Solano-Napa area. Cost is Dutch Treat.

**Dinner Meetings – 6:00 pm – 8:30 pm approx.** 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 \$35, Members and staff and \$40, nonmembers. 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 e-mail: [tereza@tabertax.com](mailto:tereza@tabertax.com) by 5 pm on the third Tuesday of each month.

**Napa Satellite Group** meets on the third Thursday of each month. These luncheons are at the Napa Elks Lodge, 2840 Soscol Ave, Napa. Meetings start at **12:30 and last till about 2:00pm.**

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.

If you would like to be placed on our e-mail list and receive our e-mail newsletter, please contact either of the following two people and they would be happy to oblige.

**Alma Guenther, EA-Chapter President**  
 Ph. 707-643-2226 e-mail: [almaea@pacbell.net](mailto:almaea@pacbell.net)

**Jerry Pusateri, EA-Membership Chair**  
 Ph. 707-426-4396 e-mail: [untaxit@pacbell.net](mailto:untaxit@pacbell.net)

**Our next two dinner meetings will be February 27** at Jack & Linda's Cafe and **March 27** at the Napa Elks Lodge. At both meetings we will have a tax season tax panel to answer your tough tax questions. The guest for each dinner will be **Joe Calderaro, IRS**, and the panel will consist of Joe Calderaro and two Solano-Napa Chapter EAs.

Respectfully,  
 Alma Guenther, EA  
 President, Solano-Napa CSEA

**For your convenience, a CSEA Professional Associates Application is attached to this Newsletter.**

**We believe that the benefits of membership are well worth the fee.**

## Welcome, CTEC Registered Tax Preparer (**CRTP**)

The Solano-Napa Chapter, California Society of Enrolled Agents, is extending an invitation to you in this newsletter because we want you to know that we are here to assist you and that membership in our organization is available to you as Professional Associate. Do you know that you can complete MOST of your continuing education requirements each year through our monthly dinner meetings (see information in the calendar of events in this newsletter) and our Summer Mini Seminars. Information for those seminars will be out soon!

By becoming a Professional Associate, you are entitled to membership discounts at dinner meetings and Seminars. You get the opportunity to network with other professionals with varying degrees of experience and expertise. In addition to meeting CPE requirements, there are scholarships available if you wish to expand your professional credentials to become an **EA**.

We hope you will take the time to visit with us at one of our upcoming events, meet and share information with other tax professionals, and see what we can do to help each other. A Membership Application included with this newsletter.

In any event, we would like to meet you and get acquainted. Lastly, we have lots of **fun!** So check us out.

## Work Wanted:

Enrolled Agent looking for part time employment in the Napa area during tax season.  
Available weekends and evenings would work best.  
I am willing to do input and any "grunt" work necessary.

Please email Mike for full resume at:  
[Goldeninven76@yahoo.com](mailto:Goldeninven76@yahoo.com)

## More Work Wanted:

You had earlier helped me by forwarding my application for an EA Scholarship to the CSEA.

I have yet to complete all parts of the Special Enrollment Exam for the EA license. I need work and am writing to you in case you can help me find tax preparation work during this tax season. I would like to work at an EA's office as that would give me good experience.

I can forward my resume if required. I am outlining a brief profile here:

- Bachelors in Accountancy.
- CTEC Registered Tax Preparer since 2005.
- Experience in preparing 1040 returns with Schedules and California State returns.
- Certification in QuickBooks.
- Hard working, able to multi-task effectively.

Thank you for your time and consideration.

Sincerely,  
Dilip  
DILIP AHUJA  
55 Valle Vista Ave, # 702  
Vallejo, CA 94590  
Phone: (707) 644-3457  
Cell: (707) 334-1434  
Email: [dilipahuja@yahoo.com](mailto:dilipahuja@yahoo.com)

The following was sent to our chapter President, Alma Guenther from the IRS Stakeholder Liaison Specialist Gerry Kelly Brenner. It is filled with good information and IRS contact numbers.

Dear Ms. Guenther,

As the leader of California Society of Enrolled Agents, Solano/Napa, we know you are busy throughout the year and especially during filing season. IRS Stakeholder Liaison can help tax practitioners save valuable time by providing the right number for the right resource and contact. A Practitioner Contact list with frequently used IRS contacts is enclosed. Most of your questions can be answered by calling these numbers, but when you need additional assistance, let us connect you with the right information or expert. Although we sent most of this information within the last week, some contact information has changed and we wanted the information to be up-to-date. We hope that you will provide this important information to your members during the filing season.

## Local Contacts

IRS Stakeholder Liaison provides a staff of specialists who engage in communication, education and outreach efforts to the practitioner community. If you need assistance, please contact Stakeholder Liaison Specialist Gerry Kelly Brenner in our Oakland office at Ph. 510-637-3036 or [Geraldine.Kelly-Brenner@irs.gov](mailto:Geraldine.Kelly-Brenner@irs.gov).

You may also contact the Western Area Manager for Stakeholder Liaison, John W. Pointer, at Ph. (949) 389-4393 (Fax: (949) 389-5078) or [John.W.Pointer@irs.gov](mailto:John.W.Pointer@irs.gov).

## Provide Feedback and Suggestions to the IRS

We value your opinions and ideas. Tax practitioners know what works, what doesn't and ways to improve practices and procedures. Stakeholder Liaison established the [Issue Management Resolution System](#), or IMRS, to identify nationwide trends in the tax process that may call for changes to IRS processes and procedures. We have already implemented a number of suggestions including an IRS standardized fax sheet as a direct result of practitioner feedback.

We believe the IMRS is proof positive the IRS is working with you to improve tax administration. Please encourage members of your organization to participate by contacting the Stakeholder Liaison employee listed above when they have suggestions for improving our practices and procedures.

You may also contact the IRS Office of Taxpayer Burden Reduction. The OTBR works to simplify forms and publications, to streamline policies and procedures and to promote less burdensome legislation. Projects completed through the OTBR include:

- New Form 944, *Employer's Annual Federal Tax Return*
- Redesigned Form 940, *Employer's Annual Unemployment Federal Tax Return*
- Redesigned Schedule K-1
- Increase in business expense threshold for Schedule C-EZ

Ideas for reducing taxpayer burden can be submitted on [Form 13285A](#), *Reducing Tax Burden on America's Taxpayers*.

## Electronic Services

The IRS offers a wide range of electronic services at IRS.gov to assist you in your tax practice. In addition to [e-file for Tax Professionals](#), we also offer a number of [e-Services](#) online. Through e-Services you can submit powers-of-attorney, resolve client issues electronically and instantly receive return/account transcripts and wage and income documents on your computer. Many new [Electronic Payment Options](#) are now available including the Electronic Federal Tax Payment System (EFTPS). Plus, [Electronic IRS](#) has been added to the IRS.gov Web page to showcase electronic options available to taxpayers and tax professionals.

## Upcoming Practitioner Events

We are your first point of contact for IRS sponsored seminars, phone forums, symposiums and other practitioner events. Go to [Tax Pro Events](#) on our Web site and sign up for our subscription e-mail, [e-News for Tax Professionals](#) to get the latest IRS news and practitioner-related events in your state.

## The Tax Gap

[The tax gap](#) is the difference between the amount of tax that taxpayers *should* pay and the amount that *is* paid on time. In other words, it is the sum of non-compliance with the tax law. The latest estimate of the overall tax gap is approximately \$345 billion. Learn what you can do as a tax professional to help close the gap by visiting IRS.gov by typing in "tax gap" in the search field. We can achieve more working together.

Title	Telephone Number	Hours of Operation
Practitioner Priority Service	866-860-4259	M-F, 8:00am - 8:00pm, local time.
IRS Tax Help Line for Individuals	800-829-1040	M-F, 7:00am - 10:00pm, local time.
Business and Specialty Tax Line	800-829-4933	M-F, 7:00am - 10:00pm, local time.
e-help (IRS Electronic Products)	866-255-0654	M-F, 6:30am – 6:00pm CT (non-peak) M-F, 6:30am – 10:00pm CT (1/12/2007 – 4/27/2007) Saturdays 6:30am – 4:00pm CT (1/12/2007 – 4/27/2007)
Refund Hotline	800-829-1954	Automated Service available 24/7
Forms and Publications	800-829-3676	M-F, 7:00am – 10:00pm, local time.
National Taxpayer Advocate's Help Line	877-777-4778	M-F, 7:00am - 10:00pm, local time.
Local Taxpayer Advocate, Sacramento	916-974-5007	
Local Taxpayer Advocate, San Jose	408-817-6850	
Local Taxpayer Advocate, Oakland	510-637-2703	
Local Taxpayer Advocate, Los Angeles	213-576-3140	
Local Taxpayer Advocate, Laguna Niguel	949-389-4804	
Local Taxpayer Advocate, Hawaii	808-539-2870	
Local Taxpayer Advocate, Alaska	907-271-6877	
Centralized Lien Payoff	800-913-6050	M-F, 8:00am – 11:00pm ET
Centralized Bankruptcy	800-913-9358	M-F, 7:00am – 10:00pm ET
Telephone Device for the Deaf (TDD)	800-829-4059	M-F, 7:00am -10:00pm, local time.
Electronic Federal Tax Payment System	800-555-4477	24/7 hour operation
Government Entities (TEGE) Help Line	877-829-5500	M-F, 8:30am - 4:30pm ET
Form 706 and 709 Help Line	866-699-4083	M-F, 7:00am - 7:00pm local time
Automated Collection System (Business)	800-829-3903	M-F, 8:00am - 8:00pm, local time.
Automated Collection System (Individual)	800-829-7650	M-F, 8:00am - 8:00pm, local time.
Tax Fraud Referral Hotline	800-829-0433	Automated Service available 24/7.
Employer Identification Number (EIN)	800-829-4933	M-F, 7:00am - 10:00pm, local time.
Excise Tax and Form 2290 Help Line	866-699-4096	M-F, 8:00am - 6:00pm ET
Information Return Reporting	866-455-7438	M-F, 8:30am - 4:30pm ET
ITIN Program Office (Form W-7 and Acceptance Agent Program – Form 13551)	404-338-8963	Message Line: 24/7 hour operation
Terrorist Act or Combat Zone Special Hotline	866-562-5227	M-F, 7:00am - 10:00pm, local time.

# 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>
<b>1st Vice President</b>	<b>Ken Spingola, EA</b> 707 553-2645 <a href="mailto:kspingola@comcast.net">kspingola@comcast.net</a>		<b>Matt Jones, EA</b> 707 557-6868 <a href="mailto:mattstax@sbcglobal.net">mattstax@sbcglobal.net</a>
<b>Secretary</b>	<b>Lea Garrity, EA</b> 707 386-3390 <a href="mailto:leagarrity@charter.net">leagarrity@charter.net</a>		<b>Mike Klobas, EA</b> 707 449-8146 <a href="mailto:mklobas@pacbell.net">mklobas@pacbell.net</a>
<b>Treasurer</b>	<b>Chris Raycraft, EA</b> 707 428-4741 <a href="mailto:craycraftea@sbcglobal.net">craycraftea@sbcglobal.net</a>		<b>Tereza Avalos, EA</b> 707 678-1144 <a href="mailto:tereza@tabertax.com">tereza@tabertax.com</a>
<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

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[pcorreia@sbcglobal.net](mailto:pcorreia@sbcglobal.net)

### SEMINAR/SITE

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[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  
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[dellisea@pacbell.net](mailto:dellisea@pacbell.net)

### NEWSLETTER

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707 557-6838  
[mattstax@sbcglobal.net](mailto:mattstax@sbcglobal.net)

### *hEArD It Through The Grapevine*

**Note:** Taxpayers across the nation will have until Tuesday, April 17, 2007, to file their 2006 returns and pay any taxes due, the Internal Revenue Service announced today.

Taxpayers will have extra time to file and pay because April 15 falls on a Sunday in 2007, and the following day, Monday, April 16, is Emancipation Day, a legal holiday in the District of Columbia.

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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



## 2006-2007 CALENDAR OF EVENTS

### FEB

07 CSEA Audio Tax Seminar, Pension Protection Act of 2006, Impact on IRA & ROTH Planning, 11am-11:50am, register at [www.csea.org/events](http://www.csea.org/events) or call CSEA at 800/777-2732

13 Solano-Napa Breakfast (2<sup>nd</sup> Tue.) 8:00 am  
Jack & Linda's Country Café, Fairfield  
**Topic: What do you do if your client gets audited?**

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

### MAR

13 Solano-Napa Breakfast (2<sup>nd</sup> Tue.) 8:00 am  
Jack & Linda's Country Café, Fairfield  
**Topic: What do you do if your fee is challenged?**

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

### APR

10 Solano-Napa Breakfast (2<sup>nd</sup> Tue.) 8:00 am  
Jack & Linda's Country Café, Fairfield  
**Topic: How to fire a client!**

24 T.G.I.O. Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:30 pm

### 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

19 Solano-Napa **Planning Retreat**, 9:30 am  
Jack & Linda's Country Café, Fairfield

22 Solano-Napa Board Meeting, 3:30 pm  
Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:30 pm Topic:  
Officers and Directors Elections

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 (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,

23 Solano-Napa **Board Orientation**, 9:30 am  
Jack & Linda's Country Café, Fairfield

26 Solano-Napa Board Meeting, 3:30 pm  
Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:30 pm Topic:  
Install newly elected Officers and Directors

### JUL

10 Solano-Napa Breakfast (2<sup>nd</sup> Tue.) 8:00 am