



# SOLANO-NAPA NEWS

CALIFORNIA SOCIETY OF ENROLLED AGENTS



"WE SPEAK TAX" - the Tax Professionals

**Volume II, Number 23**

**May 2008**

## Officer Elections and Foreclosures

At our Dinner Meeting this month, May 20, date change due to **CSEA State Board Meeting**, we will have elections of Chapter Officers and Directors for 2008-2009. We will also have a presentation on **Foreclosures**. This very timely subject will be presented by Ed Sutton, **EA**.

So, don't miss the opportunity to affect the leadership of your chapter by **casting your vote**, and don't miss out on insights into a currently every day occurrence for many taxpayers and some of our clients....Sadly, **foreclosures!**

## **President's Message**

Ah....Tax season is over for another year and I have a life again! Though I am still being pestered with questions regarding those darn rebate checks!

A lot is scheduled in the coming months. It's time to get back into our chapter and state activities. At our May meeting, Ed Sutton, **EA** will give a presentation on **Foreclosures**, a very timely topic. Super Seminars are this month in Las Vegas and Reno. Our June meeting will cover **International Tax Compliance**. CSEA has the Annual Meeting and C-Star in Sacramento this year in June. Check our calendar, and CSEA website for details about registration. Keep in mind our chapter's summer mini series in August, September and October. The presenters will be Frank Acuna, attorney, Alma Guenther, **EA** and Jerry Pusateri, **EA**. The flyer will be out at the super seminars and should be in the next newsletter.

The May meeting is the election of  
(See Prez on 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:**

<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, who attend any portion of the meeting.** There is a **\$5** discount if your reservations are made timely. Reservations, and meal choice, when applicable, 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. **Tereza is our only contact with restaurants. No member should ever contact restaurants for meal choices.**

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!)

## **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 \$17.** For reservations, contact Chuck Gravett's office at (707) 258-1030 and RSVP with his secretary. Make checks payable to **Linda Luchsinger**.

(Prez, from page 1)

2008-2009 Officers and Directors of Solano-Napa. Newly elected officers will be installed at the June meeting. Due to conflict with the CSEA Board and Super Seminars, our May meeting has moved up a week to May 20<sup>th</sup>. **Be sure to mark your calendar for May 20<sup>th</sup>!** Come out and enjoy the food, conversation and participate in the elections.

Alma Guenther, EA  
President

### Solano-Napa Chapter Planning Retreat:

**Saturday, May 17<sup>th</sup> we have our Annual Planning Meeting. This is where we review what we have done and where we are going. We need your input to access if we have met our goals for '07-08 and to make new goals for '08-09. Without a plan and goals, we will not be able to live up to the standards we have set in the first three years of our Chapter. We had, in my opinion, a great start. But we need to always review and change or we will not continue to grow. You can make a difference, please attend this important meeting. We start at 9:00 am, but come early and enjoy breakfast before the meeting. We should adjourn at about noon.**

### Annual Shredding Party:

Back by popular demand is the Shredding Party, which I'm going to schedule for May 21, 2008. Boxes can be dropped off at Sherri Scarrott's office, 1325 Travis Blvd., #1, Fairfield, on Tuesday until 3:45 pm. After that time, Sherri will be leaving for CSEA's Board

Meeting; so get there on time. Please let her know how many boxes you will have. Please use the paper case sizes if at all possible! Last year we paid \$4/box and we are hoping for a price in the same range for this year. [eataxldy@pacbell.net](mailto:eataxldy@pacbell.net)

And, last but not least, you've read about the CSEA PAC (Political Action Committee) Fund Raiser by selling raffle tickets for a one-week stay in a Hawaiian condo. Travel is on your own. The tickets are 1 for \$10 or 3 for \$25. Sherri will have the tickets at the next breakfast and dinner meetings. Please seriously consider buying at least one ticket for this very worthwhile fundraiser.

From NAEA E@lert May 2, 2008:

### ADVOCACY NEWS

#### **NAEA Supports Becerra Tax Preparer Regulation Bill**

As we reported two weeks [ago](#), Rep. Xavier Becerra (D-CA) has introduced H.R. 5716, the Taxpayer Bill of Rights Act of 2008. The bill would require the Treasury Department to set standards for all commercial tax return preparers and would require unenrolled preparers to pass a competency exam in order to prepare returns for clients. In keeping with NAEA's longstanding support for initial testing and regulation of all tax preparers, NAEA President Diana Thompson, EA, [wrote](#) Becerra in support of H.R. 5716. The letter also suggests two improvements: omitting any grandfathering of preparers from the testing requirement; and providing the IRS Office of Professional Responsibility with authority to administer the regulation of all tax preparers.

Keep an eye out next week for a special NAEA alert asking you to write your representative and request that he/she cosponsor H.R. 5716. A letter template will be provided (that you'll be able to personalize as you see fit), along with instructions to find out your rep's name and mailing (or e-mail) address.

#### From CSEA BEAcon May 2008:

**C-STAR Shines!** (C-Star on page 4)



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

Dear Business Professional:

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.

**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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**2nd Vice-President**

Sherri Scarrott, EA  
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e-mail: [eataxldy@pacbell.net](mailto:eataxldy@pacbell.net)

**Secretary:**

Lea Garrity, EA  
(707) 386-3390  
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**Treasurer:**

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**Directors:**

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Matt Jones, EA  
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Gerald Pusateri, EA,  
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Don Wulf, EA  
(707) 252-0442; Fax (707) 224-3028  
Email: [dwulf@calltpac.net](mailto:dwulf@calltpac.net)

**CSEA Director**

Sherri Scarrott, EA  
(707) 426-9472 Fax: (707) 426-9478  
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**IPP**

Anne Arms, EA  
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email: [armspna@aol.com](mailto:armspna@aol.com)

**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)

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.**

(C-Star from page 2)

**C-STAR will be held in Sacramento June 23-24, 2008, in conjunction with the Society's Annual Meeting**

C-STAR (California State Tax Agency Representation) provides the opportunity for Enrolled Agents to improve their state representation skills. You joined CSEA to enhance your professional designation; here's your chance to learn critical information to do so.

C-STAR is a full two-day event with two levels of instruction. Level I - learn the basic —ins and outs to improve your understanding and competence in taxpayer representation on the State level. Level II - offers actual case study presentations with Tax Agency personnel. By attending C-STAR, you will be among the first to judge trends and learn more about Tax Agency perspectives.

Join our esteemed speakers and representatives from the BOE, EDD, and FTB. Register online at [www.csea.org](http://www.csea.org).

**Register by May 30 and save!** The registration fee includes session materials, continental breakfasts, and dinner on the first night. For more information, visit our website above or call 800/777-2732.

**[Your EApinion Counts!](#)**

Now that tax season is over, CSEA is interested in hearing from you as you emerge from your office into the sunshine, like a chrysalis emerging as a beautiful butterfly. We want your feedback as to how it went, what you did, and how you did it, insect analogies aside.

Please log on to the Members Area at [www.csea.org](http://www.csea.org) and go to **Resources**, where you'll find the latest **Member Survey**. All results will be tallied and will be available online and in next month's BEAcon.

**[Standing Reservation Reminder:](#)**

If you have a standing reservation for dinner meetings and if you do not want to be charged for a dinner that you do not consume due to not attending a meeting, then you must notify Tereza Avalos, EA, [tereza@tabertax.com](mailto:tereza@tabertax.com), that you will not attend a meeting. Please keep in mind that we need to have an accurate head count to give to Jack & Linda to prepare sufficient enough food, and for us to keep dinner cost as efficient as possible. If you do not notify Tereza, via email, that you will not attend a meeting, then you will still be charged for the standing reservation. Your cooperation is requested. Thanks.

**Candidates of Officers and Directors  
Solano-Napa Chapter CSEA '08-09**

**Officers:**

President	Ken Spingola, EA
1 <sup>st</sup> Vice Pres.	Sherri Scarrott, EA
2 <sup>nd</sup> Vice Pres.	Matt Jones, EA
Secretary	Lea Garrity, EA
Treasurer	Chris Raycraft, EA
CSEA Director	Sherri Scarrott, EA
I.P.P.	Alma Guenther, EA

**Directors:**

Lillian Meyers, EA  
 Marcia Gillespie, EA  
 Phil Correia, EA  
 Tereza Avalos, EA  
 Donald Wulf, EA  
 Janeen Webber, EA

***Your vote counts!!!  
 Come and cast it!!!***

# 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>1st Vice President</b>	<b>Ken Spingola, EA</b> 707 553-2645 <a href="mailto:kspingola@comcast.net">kspingola@comcast.net</a>
<b>2<sup>nd</sup> Vice President</b>	<b>Sherri Scarrott, EA</b> 707 426-9472 <a href="mailto:eataxldy@pacbell.net">eataxldy@pacbell.net</a>
<b>Secretary</b>	<b>Lea Garrity, EA</b> 707 386-3390 <a href="mailto:leagarrity@charter.net">leagarrity@charter.net</a>
<b>Treasurer</b>	<b>Chris Raycraft, EA</b> 707 428-4741 <a href="mailto:craycraftea@sbcglobal.net">craycraftea@sbcglobal.net</a>
<b>CSEA Director</b>	<b>Sherri Scarrott, EA</b> 707 426-4396 <a href="mailto:eataxldy@pacbell.net">eataxldy@pacbell.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>Directors</b>	<b>Marcia Gillespie, EA</b> 707 251-5520 <a href="mailto:marcial2ea@yahoo.com">marcial2ea@yahoo.com</a>
	<b>Matt Jones, EA</b> 707 557-6838 <a href="mailto:mattstax@sbcglobal.net">mattstax@sbcglobal.net</a>
	<b>Gerald Pusateri, EA</b> 707 426-4396 <a href="mailto:untaxit@pacbell.net">untaxit@pacbell.net</a>
	<b>Tereza Avalos, EA</b> 707 678-4477 <a href="mailto:tereza@tabertax.com">tereza@tabertax.com</a>
	<b>Donald Wulf, EA</b> 707 252-0442 <a href="mailto:dwulf@calltpac.net">dwulf@calltpac.net</a>
	<b>Lillian Meyers, EA</b> 707 935-1124 <a href="mailto:Lillian@meyersfinancial.com">Lillian@meyersfinancial.com</a>

## Chapter Committee Chairs

<b>AUDIT</b> Phil Correia, EA 707 426-0920 <a href="mailto:pcorreia@sbcglobal.net">pcorreia@sbcglobal.net</a>	<b>DINNER/SITE</b> Sherri Scarrott, EA 707 426-9472 <a href="mailto:eataxldy@pacbell.net">eataxldy@pacbell.net</a>	<b>NOMINATING</b> Peggy Elliott, EA 707 421-8088 <a href="mailto:peggye@aol.com">peggye@aol.com</a>	<b>PUBLIC AWARENESS</b> Marcia Gillespie, EA 707 251-5520 <a href="mailto:marcial2ea@yahoo.com">marcial2ea@yahoo.com</a>
<b>BYLAWS</b> Lea Garrity, EA 707 386-3390 <a href="mailto:leagarrity@charter.net">leagarrity@charter.net</a>	<b>BREAKFAST FACILITATOR</b> Alma Guenther, EA 707 643-2226 <a href="mailto:almaea@pacbell.net">almaea@pacbell.net</a>	<b>MEMBERSHIP</b> Gerald Pusateri, EA 707 426-4396 <a href="mailto:untaxit@pacbell.net">untaxit@pacbell.net</a>	<b>RESERVATIONS</b> Tereza Avalos, EA 707 678-1144 <a href="mailto:tereza@tabertax.com">tereza@tabertax.com</a>
<b>Preservation of Practice due to Medical Emergency or Death (PPMED)</b> Peggy Elliott, EA 707 421-8088 <a href="mailto:peggye@aol.com">peggye@aol.com</a>		<b>FINANCE &amp; BUDGET</b> Doug Ellis, EA 707 448-1407 <a href="mailto:dellisea@pacbell.net">dellisea@pacbell.net</a>	<b>NEWSLETTER</b> Matt Jones, EA 707 557-6838 <a href="mailto:mattstax@sbcglobal.net">mattstax@sbcglobal.net</a>

### *hEArD It Through The Grapevine*

There are several good reasons to register NOW, today, for the 26th Annual CSEA Super Seminar in May 2008. Most importantly, you ensure that you've got all the sessions you want. Especially with a new location looming in Las Vegas (the fabulous Flamingo Las Vegas on the Strip!), session size may be limited. That holds true in Reno, too, at the newly-renovated Grand Sierra Resort & Casino, which promises to live up to its —Grand name! There is still time to register for the best tax education money can buy, with Super locations, Super speakers, and a **SUPER SEMINAR!** Register today at [www.csea.org/superseminar](http://www.csea.org/superseminar).

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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



## 2008 CALENDAR OF EVENTS

### MAY

- 13 Solano-Napa Breakfast (2<sup>nd</sup> Tue.) 8:00 am  
Jack & Linda's Country Café, Fairfield  
Topic: **What went right? What went wrong?**
- 15 Napa Satellite Group, Lunch Meeting, Napa Elk  
Club, 2840 Soscol Ave., Napa, 12:30 pm
- 17 Solano-Napa Annual Planning Retreat 9:00 am  
Jack & Linda's Country Café, Fairfield
- 19-21 **CSEA Super Seminar A, Las Vegas, NV**  
Check [www.csea.org](http://www.csea.org) for more details.
- 20 **Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:30 pm**  
**Topic: Foreclosures, Ed Sutton, EA**  
**Election of Chapter Officers & Directors**  
**Jack & Linda's Country Café, Fairfield**
- 22-24 **CSEA Super Seminar B, Las Vegas, NV,**  
Check [www.csea.org](http://www.csea.org) for more details.
- 26-28 **CSEA Board Meeting, Reno, NV**
- 29-31 **CSEA Super Seminars, Reno, NV,** Check  
[www.csea.org](http://www.csea.org) for more details.

### JUN

- 10 Solano-Napa Breakfast (2<sup>nd</sup> Tue.) 8:00 am  
Jack & Linda's Country Café, Fairfield  
Topic: **Out of Season Revenue – Staying in  
Business**
- 14 Solano-Napa Board Orientation, 9:00 am-1:00  
pm, Jack & Linda's Country Café, Fairfield
- 19 Napa Satellite Group, Lunch Meeting, Napa

Elks Club, 2840 Soscol Ave., Napa, 12:30 pm  
C-STAR, Sacramento, CA. Check  
[www.csea.org](http://www.csea.org) for more details.

- 23
- 24 Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:30 pm  
**Installation of Officers 2008-2009**  
Topic: **What's Hot in International Tax  
Compliance for Individuals, Carlos Zepeda,  
IRS**  
Jack & Linda's Country Café, Fairfield

### JUL

- 8 Solano-Napa Breakfast (2<sup>nd</sup> Tue.) 8:00 am  
Jack & Linda's Country Café, Fairfield  
Topic: **Transforming Debt into Wealth, Sylvia  
Barata, EA**
- 17 Napa Satellite Group, Lunch Meeting, Napa Elk  
Club, 2840 Soscol Ave., Napa, 12:30 pm
- 22 Solano-Napa CSEA Board Meeting 4:00 pm  
Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:30 pm Topic:  
TBA  
Napa Elk Club, 2840 Soscol Ave., Napa

### AUG

- 12 Solano-Napa Breakfast (2<sup>nd</sup> Tue.) 8:00 am  
Jack & Linda's Country Café, Fairfield  
Topic: TBA
- 15 Napa Satellite Group, Lunch Meeting, Napa Elk  
Club, 2840 Soscol Ave., Napa, 12:30 pm
- 26 Solano-Napa CSEA Board Meeting 4:00 pm  
Solano-Napa Dinner (4<sup>th</sup> Tue.) 6:30 pm Topic: