

CSEA News & Events

Chapter Education and Events

Vol. 9, Issue 2 • August 2016

For detailed information on Chapter continuing education credits, please visit the Chapter's website.

BIG VALLEY meets the second Thursday of every month except February through April at the Stockton Hilton, 2323 Grand Canal Blvd., Stockton. Board meeting begins at 4:30 p.m. (except December), networking at 5:30 p.m. and dinner at 6 p.m.

- **August 11 Dinner Meeting: Will This Business Go Up In Smoke? Accounting and Tax Issues in the Marijuana Arena, with speaker Ruth Rowlette, Esq., EA** – 2 hours CE. Optional dress code theme night: Luau.
- **September 8 Dinner Meeting: Estate and Trust - Basic, with speakers Connie Ferrell, EA and Linda Bossard, EA, USTCP** – 2 hours CE. Optional dress code theme night: Back-2-School.
- **October 16 Dinner Meeting: Estate and Trust - Advanced, Revocable and Irrevocable, with speaker Frank Acuna, Esq.** – 2 hours CE. Optional dress code theme night: Halloween.
- **November 10 Dinner Meeting: Special guest FTB Taxpayers' Rights Advocate Susan Maples, CPA** – 1 hour CE. Optional dress code theme night: Harvest.
- **November 15 Seminar: 1040 Review & Update, in partnership with ClientWhys, at the Stockton Hilton** – 3 hours Federal Update plus 5 hours of Federal Tax Topics. Call 800-442-2477 x1 to reserve your seat or register online at www.taxcpe.com. Be sure to mention you are registering from Big Valley Chapter.

For Dinner Meeting reservations, please contact Catherine Korelin, EA at cathikorelin@sbcglobal.net or call 209/589-7326. Visit the Chapter website at www.bigvalleycsea.org.

CENTRAL CALIFORNIA meets the second Tuesday in January and May through September at the Ramada Inn, Shaw Ave. & Hwy. 41 in Fresno. The October meeting is held the Tuesday following the 15th deadline.

The Central California Chapter is offering a special two-part meeting in August and September.

- **August 9 Dinner Meeting: Fundamentals of LLCs and Partnerships (Part 1).**
- **September 13 Dinner Meeting: Fundamentals of LLCs and Partnerships (Part 2).**

Each meeting is 4 hours of CE. Special cost for this two-meeting offering is \$150 – includes 258 page manual, 8 hours of live CE, and dinner at each meeting.

RSVP to mickie@taxladies.net or 559/221-1178 to register and confirm meeting details.

CENTRAL COAST meets the third Wednesday of every month except January through April at Ventana Grill, 2575 Price Street, Pismo Beach.

- **August 17 Dinner Meeting: AMT - Demystified, with speaker Karen Brosi, EA** – 2 hours of CE.
- **South Chapter Lunch Meetings are usually held on the first Wednesday of each month at noon, May through January** (we don't meet in February, March or April) at Me and Z's Restaurant, 1351 East Grand Avenue in Arroyo Grande. Please contact John Ozanich, EA with any questions at taxjohn@att.net.
- **North Chapter Lunch Meetings are usually held on the fourth Tuesday of each month at noon, May through January** (we don't meet in February, March or April) at Guest House Grill, 8783 El Camino Real in Atascadero. Please contact Heather Grandgeorge, EA with any questions at grandgeorgeh@gmail.com.

For membership information, email info@centralcoastea.org. Visit the Chapter website at www.centralcoastea.org.

CSEA Events Calendar

www.csea.org/education-events/calendar-of-events

September 28-30, 2016 - CA State Tax Agencies Representation (CSTAR), CSEA State Office, Sacramento

October 21, 2016 - State Tax Agencies Liaison Meeting (STALM), FTB Headquarters, Sacramento

October 22-23, 2016 - CSEA Board and Committee Meetings, Holiday Inn, Sacramento

November 1, 2016 - CSEA Chapter Connection Meeting via WebEx Webinar

December 31, 2016 - CSEA Education Foundation Scholarship Application Deadline

January 7-8, 2017 - CSEA Board and Committee Meetings, Holiday Inn, Sacramento

January 9, 2017 - Jim Stern Legislative Day, California State Capitol, Sacramento

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[www.linkedin.com](https://www.linkedin.com/company/CSEA)
Member networking

www.twitter.com/CASocietyEA
Tax links and breaking news

CHANNEL ISLANDS meets at 6 p.m. the first Thursday of every month except March and April at the Marriott Courtyard Hotel, 600 E. Esplanade Drive, Oxnard.

- **September 1 Dinner Meeting: Retirement Plans for the Self-Employed, with speaker Vicki Mulak, EA, CFP®.**
- **September 26 All-Day Meeting: Stocking Your Tool Box, hosted by Brass Tax with speakers Lisa Ihm, EA and Mike Karall, EA, at Sheraton Four Points Harbortown, 1050 Schooner Drive, Ventura. Registration is online at www.BrassTax.com. Please put "Channel Islands" in the Referred by line to help our Chapter when registering. Registration fee: \$225 by July 31, \$240 afterwards, \$250 at the door.**
- **October 6 Dinner Meeting: Clergy and Church Taxes, with speaker Bob Stimmel, EA.**
- **November 1 All-Day Meeting: Fall Update Seminar, hosted by ClientWhys with speakers Lee Reams, EA and Arthur Werner, JD. Call ClientWhys at 800-442-2477 x1 and mention "Channel Islands" to help our Chapter when registering. Registration fee: \$229 by August 31.**
- **November 3 Dinner Meeting: NOLs, with speaker Mark Seid, EA, TCP.**
- **December 1 Dinner Meeting: Ethics Update, with speaker Jennifer MacMillan, EA.**
- **December 12 All-Day Meeting: TuneUp/Update, hosted by Brass Tax with speakers Lisa Ihm, EA and Mike Karall, EA, at Sheraton Four Points Harbortown, 1050 Schooner Drive, Ventura. Registration is online at www.BrassTax.com. Please put "Channel Islands" in the Referred by line to help our Chapter when registering. Registration fee: \$225 by October 31, \$240 afterwards, \$250 at the door.**
- **January 5, 2017 Dinner Meeting: Topic TBD, with speaker Lee Reams, EA.**
- **February 2, 2017 Dinner Meeting: CA Tax Updates, with Susan Maples, CPA.**

To register for Dinner Meetings, R.S.V.P. via 123 SignUp at www.cicsea.org, or contact Linda Wall at 805/340-8822 or email linda@evanstax.net. For Chapter information, contact Bart Ketterling, EA at 805/653-7362.

EAST BAY dinner meetings are usually held on the third Wednesday of every month except April (when the Chapter is dark) at the Dublin Holiday Inn, 6680 Regional St., Dublin. The Chapter also hosts morning breakfast meetings in Brentwood, Castro Valley, Danville, Hayward, Livermore, and Oakland. For details, contact Patty Pringle, EA at 925/320-7802 or email patty@eastbaytaxpros.com.

- **August 17 Dinner Meeting: Clients with Foreign Assets, with speaker Steven L. Walker, Esq.** The meeting will be held at the Holiday Inn in Dublin. Please check the EBAEA website for additional details.
- **August 30 Seminar: 22nd Annual Tax Practitioner/IRS Fall Seminar. Learn to maximize IRS resources to increase YOUR value to YOUR clients.** This seminar takes place from 8 a.m. - 4 p.m. at the Holiday Inn in Dublin. Let Subject Matter Experts from the IRS and FTB clarify issues and hot topics of importance to YOU and YOUR tax practice, including:
 - **IRS Future State Initiative – Derek Ganter, Western Area Manager, IRS Stakeholder Liaison.**
 - **My FTB Overview – Mark Malevski, FTB Taxpayers' Rights Advocate Office.**
 - **TIGTA (Treasury Inspector General for Tax Administration) – Jason Pritchard, TIGTA Supervisor.**
 - **Panel Discussion – Representatives from IRS, FTB, and East Bay & Mission Chapters.**
 - **Estate and Gift Tax Overview – Kyle Martin, Manager, IRS Estate and Gift Tax.**
 - **Examination Update – Albert Ju, IRS Examination Territory Manager.**
 - **Offers in Compromise Update – Stefanie Zimmerman, IRS Offer Specialist.**

For more information, please visit www.ebaea.org and select from the Events drop down tab. This event is sponsored by both the East Bay and Mission Chapters. Registration includes continental breakfast, lunch and afternoon refreshments – 6 hours Federal CE & 1 hour CA or NAEA CE. For more information, please contact Patty Pringle, EA at 925-320-7802 or epattypringle@sbcglobal.net or the EBAAEA Chapter Office at info@ebaea.org.

Visit the Chapter website at www.ebaea.org for more details or to register for an event.

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FAR NORTHERN CALIFORNIA Board meetings are usually held on the first Wednesday of the month from 9:30 a.m. - 11:30 a.m. except February through April at the Holiday Inn Express & Suites, 2810 Main St. in Red Bluff.

- **Redding Roundtable Meetings** usually take place on the first Wednesday of the month from 12 p.m. - 1 p.m. at LuLu's Restaurant, 2230 Pine Street. For more information contact Gayle Batti, EA at 530/547-3729.
 - **September 7 Redding Roundtable:** speaker and topic TBA.
- **Chico Roundtable Meetings** are held from 8 a.m. - 9 a.m. on the first Thursday of the month at Cozy Diner Restaurant on the corner of Mangrove and East 7th Ave. There will be Roundtable meetings during May; however, no CE will be offered. For more information contact Dan Vincent, EA at 530/894-4041.
 - **September 8 Chico Roundtable:** topic and speaker TBA.
- **Far Northern California Chapter is offering a live/virtual Special Enrollment Exam (SEE) class on Tuesdays from 6 - 9 p.m. beginning June 14.** All those wishing to prepare for the SEE can participate in this virtual class with live instructors. For more information, email Rose Fulton at roseefulton@gmail.com.
- **September 22 Seminar: Ethics**, location TBD.
- **November 3-4 Seminar: Federal Tax Law Topic Update, with FNCC and NATP presenters**, 8 a.m. - 5 p.m. at Rolling Hills Casino, 2655 Everett Freeman Way, Corning.
 - Day 1: Beyond the 1040.
 - Day 2: 2016 Alternative Minimum Tax, Foreign Investment Reporting and Net Operating Losses.[Click here](#) for more information.

Visit the Chapter website at www.fncc.org.

GOLDEN GATE meets at the Crowne Plaza Foster City, 1221 Chess Drive, Foster City, usually on the third Thursday of each month except when moved to avoid scheduling conflicts. For more information, contact Norman@GoldenTax.com.

- **August 12 Peninsula tEAm Meeting:** 8:30 a.m. at the offices of Southward & Associates, 132 El Camino Real, San Carlos. For more information, please contact Amanda Boston, EA at 650/591-9661.
- **September 2 San Francisco tEAm Meeting:** 8 a.m. at Boulevard Cafe, 2 Poncetta Drive, Daly City. Call Rico Delodovici, EA for more information at 650/591-9200 or email him at RicoEA@outlook.com.

Please note: tEAm meetings are for Golden Gate Society (GGSEA) Members only, California Society of Enrolled Agents (CSEA) Members and potential Members only.

- **August 18 Membership Meeting: "The Reckoning Arrives – The Department of Labor's Fiduciary Rule and Retirement Plan Changes,"** presented by Christopher Devcich of Edward Jones.

Visit the Golden Gate Society website at www.ggsea.org.

INLAND EMPIRE meets the second Wednesday of every month except January through April at 6 p.m. at The Double Tree Hilton, 285 E. Hospitality Lane, San Bernardino.

- **August 10 Dinner Meeting: California Updates**, with speaker Lynn Freer, EA.
- **September 14 Dinner Meeting: IRS Updates**, with speakers IRS Stakeholder Liaisons Derek Ganter and Amy Smith.
- **October 12 Dinner Meeting: Tax Planning for the Silver Tsunami**, with speaker Rodney Coutts, EA.
- **November 4 Client Whys Seminar: 1040 Review and Update**, at the Ontario Airport Double Tree Hotel.
- **November 9 Dinner Meeting: Ethics Update & Review**, with speaker Mark Seid, EA, CPA, USTCP.
- **December 14 Dinner Meeting: topic and speaker TBA.**

Visit the Chapter website at www.ietaxpro.org.

LOS ANGELES meets the second Tuesday of every month except for April & October at 6 p.m. at the Taix French Restaurant, 1911 Sunset Blvd., Los Angeles, 90026.

- **August 9 Dinner Meeting: California Updates**, speaker Lynn Freer, EA.
- **1040 Review and Update**, in partnership with Client-Whys, at the following locations:
 - November 2, Van Nuys Airtel Plaza Hotel, 7277 Valjean Avenue, Van Nuys
 - November 3, Arcadia Embassy Suites, 211 E Huntington Drive, Arcadia
 - November 9, Holiday Inn, 19800 South Vermont Avenue, Torrance
 - November 10, Holiday Inn, 14299 Firestone Boulevard, La Mirada[Click here](#) for more information.

For additional information and last minute meeting announcements, visit the Chapter website at www.lacsea.org.



MISSION Board of Directors meeting usually takes place at the Holiday Inn, 1350 N. 4th St., San Jose, CA 95112, with the following schedule:

10:00 a.m. - 11:30 a.m. – Board Meeting – *Everyone is Invited*
11:30 a.m. - 12:00 p.m. – Mingle & Network
12:00 p.m. - 12:30 p.m. – Lunch / Announcements
12:30 p.m. - 2:10 p.m. – Speaker

- **August 11 Education Committee Meeting**, 1 p.m. - 2:30 p.m. at the Willow Glen Library, 1157 Minnesota Ave., San Jose.
- **August 16 Meeting: topic and speaker TBA.** Please note that this meeting takes place at Mariani's Inn & Restaurant, 2500 El Camino Real, Santa Clara.

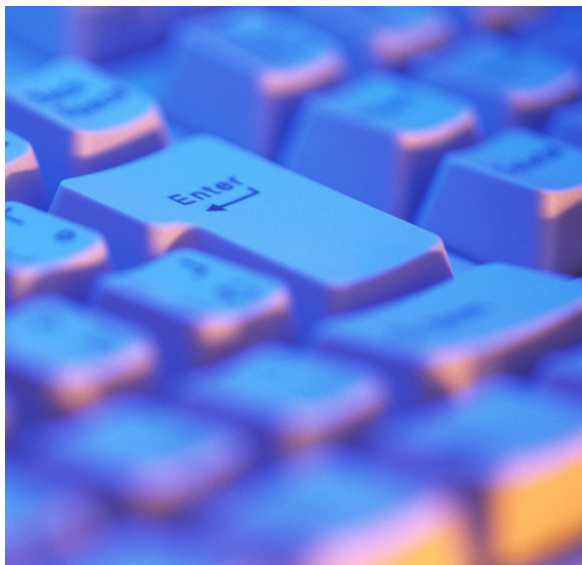
MSEA Mini-Seminars – August 13 through October 1.

- **August 13: Depreciation; Forms 4797 & 3115**, with speaker **Frank Lloyd, EA.**
- **August 20: Tax Issues for the Home Based Business**, with speaker **Mark Seid, CPA, EA.**
- **August 27: Handling Clients with Foreign Assets**, with speaker **Steven Walker, Esq.**
- **September 10: California Update**, with speaker **Susan Maples, CPA.**
- **September 17: S Corporations, Beyond the Basics**, with speaker **Linda Coleman, EA.**
- **September 2: Married Filing Separate**, with speaker **Cynthia Leachmoore, EA.**
- **October 1: Ethics/Interview & Tax Tools**, with speaker **Torie Charvez, EA.**

All mini-seminars take place at Cambrian Park United Methodist Church, 1919 Gunston Way, San Jose from 8:30 a.m. - 12:10 p.m. [Click here](#) for details.

Attendees should always confirm the date with the actual event listing, as we occasionally must re-schedule on a different date due to conflicts or facilities availability.

For education and event information, contact the MSEA office at 800/832-6732 or office@missioneas.org. Visit the Chapter website at www.missioneas.org.



NORTH BAY has regular Dinner Meetings on the third Thursday of each month at 6 p.m. at the Inn Marin, 250 Entrada Drive, Novato, and Lunch Meetings on the fourth Tuesday of each month at 11:45 a.m. at the Fountaingrove Inn, 101 Fountaingrove Parkway, Santa Rosa, except during tax season.

- **August 18 Dinner Meeting in Novato: Tax Technology Panel**, featuring **Michelle Tanner, EA**, **Richard Ogg, EA** and **Steve Montoya, IT Tech** – 2 hours CPE for NAEA and CSEA (no CPE is offered for IRS or CTEC). For more information, [click here](#).
- **August 23 Lunch Meeting in Santa Rosa: Capitalization Rules (aka Repair Regs) with speaker Cameron L. Hess, Esq., CPA** – 2 hours CPE for IRS (tax topics), CTEC (federal), NAEA and CSEA. For more information, [click here](#).

For meeting and event details and reservations, visit the Chapter website at www.NorthBayEA.org; click on "Calendar" under "Events" in the top menu bar. For meeting inquiries in Marin contact Susan Harper, EA at MarinRegistrar@NorthBayEA.org; in Sonoma County, contact Gary Parodi, EA at SonomaRegistrar@NorthBayEA.org. For information on Sonoma breakfast meetings, contact Joann DeVries, EA at 707/539-6070 or SonomaBreakfasts@NorthBayEA.org. For information on Marin breakfast meetings during tax season, contact MarinTaxBreakfasts@NorthBayEA.org.

ORANGE COUNTY meets the third Tuesday of each month except April at 5:30 p.m. at the Phoenix Club, 1340 S. Sander-son Ave., Anaheim.

- **The Orange County Chapter will offer a Special Enrollment Examination (SEE) course with instructor Lisa Ihm, EA.**
Location & Time: National University Costa Mesa Campus, 3390 Harbor Blvd, Costa Mesa, 8:30 a.m. - 4:30 p.m.
- **Part 2:** Partnerships, C Corporations, S Corporations, Fiduciaries and other topics, August 22-24.
- **Part 3:** Practice before the IRS, Power of Attorney, Ethics and other topics, October 4.
For more information, please contact Joyce Cheng, EA at jcheng@taylorlaw.com.
- **August 16 Seminar: topic and speaker TBA.**
- **August 16 Dinner Meeting: topic and speaker TBA.**
- **September 20 Seminar: Divorce and Innocent Spouse**, speaker TBA.
- **September 20 Dinner Meeting: Military Taxpayer**, speaker TBA.

For Dinner Meeting details contact Joe Guccione, EA, CFP® at 714/842-5285 or gucci-one@msn.com. Visit the Chapter website at www.eaoc.org.

PALOMAR Dinner Meetings are held the third Wednesday of each month from 5:30 p.m. - 8:45 p.m. at the Cocina Del Charro Restaurant, 890 West Valley Parkway (east side of I-15 frwy.), Escondido. The Board Meeting takes place at 4:30 p.m. followed by the General Meeting at 6 p.m. Palomar Chapter also hosts Breakfast Meetings at a time and location to be announced. **Please note that Breakfast and Dinner Meeting locations are tentative and subject to change – check the Palomar Chapter website for updates.**

- **August 17 Dinner Meeting: Audit Red Flags and Controversies, with speaker Jonathan Amitrano, Esq.**

For meeting information call 760/744-4553 or email Paula Traber, CPA at traber@cox.net. Visit the Chapter website at www.cseapalomar.org.

SACRAMENTO VALLEY meets the third Thursday of each month except December, February, March and April, from 6 p.m. - 8:50 p.m. at the Dante Club, 2330 Fair Oaks Boulevard, Sacramento, for two hours of CE for the price of one and a dinner buffet.

- **August 18 Dinner Meeting: 1031 Exchanges, with speakers** **Ciro M. Imordino, Esq.** and **Mary F. Philippsen, EA.**
- **September 22 Dinner Meeting: What's the best way to hold title to your Property? with speaker** **Cameron Hess, CPA, Esq.**
- **October 20 Dinner Meeting: Schedule K-1, Where do the numbers go? with speaker** **Mary F. Philippsen, EA.**
- **November 17 Dinner Meeting: FBAR vs FACTA, with speaker** **Marc Zine, CPA, IRS Senior Stakeholder Liaison; and Criminal Investigations, speaker TBA.**
- **October 20 Mini-Seminar: Partnerships/LLC – Pencil to Paper, with speaker** **Mary F. Philippsen, EA.**
- **October 27 Mini-Seminar: Independent Contractor vs. Employee Hands On Workshop, with** **Ling Wu, EDD Senior Employment Tax Consultant.**
- **November 3 Mini-Seminar: Schedule C – from Planning to Payroll, with speaker** **Carol Thompson, EA.**
- **November 17 Mini-Seminar: Various Tax Treatments & Benefits of Business Vehicles, Meals & Entertainment, with speaker** **Randy Roth, EA**

Visit the Chapter website at www.sacvalleyeas.com.

SAN DIEGO meets on the second Tuesday of the month except February through April at 5:30 p.m. at the Sheraton Hotel in Mission Valley.

- **August 9 Dinner Meeting: Basis Bingo, with speaker** **Rodney Coutts, EA.**
- **September 13 Dinner Meeting: Ethics, with speaker** **Roger Garay, EA.**
- **October 11 Dinner Meeting: Special guest speaker** **FTB Taxpayers' Rights Advocate Susan Maples, CPA.**

For Dinner Meeting information and reservation requests, send email to dinner@cseasandiego.org or call 619-345-4535. Visit the Chapter website at www.cseasandiego.org.

SAN FERNANDO VALLEY dinner meetings are held the second Monday of each month. We are dark February through April, resuming again in May, at 6:00 p.m. at the Airtel Plaza Hotel, 7277 Valjean Ave., Van Nuys.

- **August 8 Dinner Meeting: Partnership/LLC Mini Intensive, with speaker** **Vicki Mulak, EA CFP®, 7 p.m. to 9 p.m.** at the Airtel Plaza Hotel – 2 hours CE.
- **November 2 Chapter Fall Update Seminar: 8 a.m. to 4:30 p.m.** at the Airtel Plaza Hotel – 8 hours Federal CE (3 hours Federal Update and 5 hours Federal Tax Topics). [Click here](#) for additional information.

For Dinner Meeting reservations, visit the Chapter website at www.sfvea.org. Registrations at the door pay \$5 extra.

SAN GABRIEL VALLEY Dinner Meetings are held at the Santa Anita Golf Course, 405 South Santa Anita Ave., Arcadia, CA 91006. The Chapter meets the third Wednesday May through January and the third Sunday in February and March. The Chapter is dark in April. The Board Meeting takes place from 4:30 p.m. - 5:30 p.m., the meet and greet is from 5:30 - 6 p.m.; and dinner starts at 6 p.m.

- **August 17 Dinner Meeting: Special Occupations, with speaker** **Rubino – 5:00 p.m. (3 hours).**

For membership information, email membership@sgvea.org. Visit the Chapter website at www.sgvea.org.

SOLANO-NAPA Breakfast Meetings are usually held at 7:30 a.m. on the second Tuesday of the month at Mimi's Cafe, 1650 Gateway Blvd., Fairfield. Board and dinner meetings are usually held on the fourth Tuesday of the month. Board meetings begin at 4:30 p.m. and dinner at 6 p.m. The Napa Satellite Group meets on the third Thursday of each month from 12:30 p.m. - 2:00 p.m. at the Napa Elks Lodge, 2840 Soscol Ave., Napa.

- **August 23 Seminar:**
 - **Understanding Property Sales, with speaker** **Jerry Pusateri, EA, 2 p.m. to 6 p.m., followed by dinner.**
 - **Understanding the New Closing Disclosure (which is replacing the old HUD-1) with speaker** **Jerry Pusateri, EA, following dinner from 7:20 p.m. - 9 p.m.** at the Courtyard by Marriott Fairfield, 1350 Holiday Lane – 4 hours Federal Tax Law CE and 2 hours Closing Disclosure Federal Tax Law CE.

Visit the Chapter website at <http://solanonapa-ea.org>.

SOUTH BAY meets on the third Tuesday of every month at the Holiday Inn Torrance, 19800 Vermont Ave., beginning with the board meeting at 5 p.m. and dinner at 6:30 p.m. The Chapter is dark December through March. For more information about Dinner Meetings and Seminars, call 310/512-7783 or visit the Chapter website.

- **August 16 Dinner Meeting: Tax Planning and Tax Changes, with speaker** **Wayne Otchis, CPA – 2 hours Federal CE.**

For additional information or to register for events, visit the South Bay Chapter website at www.sobaycsea.org. For Chapter information contact Greg Cash, EA at 562-597-4300, or email gregcashtaxplus1@charter.net. Visit the Chapter website at www.sobaycsea.org.