

# CSEA News & Events

Chapter Education and Events

Vol. 9, Issue 6 • December 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.

- **December 8 Holiday Gala Celebration:** The holiday party will be held at Chez Shari, 305 N. Union Road, Manteca.
- **January 12 Dinner Meeting: California Update, with special guest FTB Taxpayers' Rights Advocate Susan Maples, CPA.**

For Dinner Meeting reservations, please email [bigvalleycsea@aol.com](mailto:bigvalleycsea@aol.com). Visit the Chapter website at [www.bigvalleycsea.org](http://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. RSVP to [mickie@taxladies.net](mailto: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.

- **December 21 Dinner Meeting: Tax Aspects of Gifts and Gifting, with speaker Steven Walker, Tax Attorney, from San Jose.** To celebrate the holidays, we are having a special meal where attendees can choose their entrée from either Prime Rib, Baked Salmon or Linguini in Pesto Sauce. **RSVP must be received by December 6, 2016 so we can advise the Ventana Grill of how many folk want which entrée.**
- **January 11 Mini-Update Seminar: Mark Seid, EA, CPA, USTP will give us two hours of updates as part of a special dinner meeting – 6 p.m. social hour, 6:30 p.m. dinner and 7 p.m. presentation, at the Ventana Grill (the same location and times as our regular monthly dinner meetings).** Please note that this is taking place on the second Wednesday of the month, not the normal third Wednesday.
- **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](mailto:taxjohn@att.net).
- **North Chapter Lunch Meetings:** Please contact Heather Grandgeorge, EA at [grandgeorgeh@gmail.com](mailto:grandgeorgeh@gmail.com) for more information.

For membership information, email [info@centralcoastea.org](mailto:info@centralcoastea.org). Visit the Chapter website at [www.centralcoastea.org](http://www.centralcoastea.org).

**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.

- **December 12 All-Day Meeting: TuneUp/Update, hosted by Brass Tax with speakers Lisa Ihm, EA and Mike Karll, EA,** at Sheraton Four Points Harbortown, 1050 Schooner Drive, Ventura. Registration is online at [www.BrassTax.com](http://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 Dinner Meeting: Federal Tax Updates, with speaker Lee Reams, EA.**
- **February 2 Dinner Meeting: CA Tax Updates, with FTB Taxpayers' Rights Advocate Susan Maples, CPA.**

To register for Dinner Meetings, R.S.V.P. via 123 SignUp at [www.cicsea.org](http://www.cicsea.org), or contact Linda Wall at 805-340-8822 or email [linda@evanstax.net](mailto: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-Pleasanton 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](mailto:patty@eastbaytaxpros.com).

- **December 21 Dinner Meeting: Tax Planning with Reverse Mortgages, with speaker Tom Oviatt from Wymac Capital.**

Visit the Chapter website at [www.ebaea.org](http://www.ebaea.org) for more details or to register for an event.



**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.
  - **December 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. For more information contact Dan Vincent, EA at 530-894-4041.
  - **December 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.** 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](mailto:roseefulton@gmail.com).
- **January 10 Seminar: CalFed Update, with speaker Vicki Mulak, EA, CFP®,** 8 a.m. - 5 p.m. at the Win River Casino, 2100 Redding Rancheria, Redding – 3 Hours Federal Updates and 5 Hours CA Updates. [Click here](#) for details.

Visit the Chapter website at [www.fncc.org](http://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](mailto:Norman@GoldenTax.com).

- **December 9 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.
- **January 6 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](mailto: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.

- **December 15 Membership Meeting: topic and speaker to be announced.**

Visit the Golden Gate Society website at [www.ggsea.org](http://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.

- **December 6 Seminar: State Tax Agencies Liaison Meeting (STALM) Review,** 3 p.m. - 5 p.m. Registration is limited – please visit [www.ietaxpro.org](http://www.ietaxpro.org) for details.
- **December 14 Dinner Meeting: Schedules C and E – A Refreshing Look,** with speaker Doug Pickford, EA, CSEA President.
- **January 10 IRS-CSEA Practitioner Seminar in Ontario: Hear from IRS representatives about policies and procedures that impact you and your clients, and learn how to maximize resources to increase your value to your clients,** 8 a.m. - 4:30 p.m. at the Azure Hotel, 1945 Holt Blvd., Ontario – 7 hours CE. Cost includes continental breakfast, lunch and refreshments. [Click here](#) for details, or contact Vic Morel, EA at 951-237-8728 or [victaxea@yahoo.com](mailto:victaxea@yahoo.com).

Visit the Chapter website at [www.ietaxpro.org](http://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.

- **December 13 Dinner Meeting: topic and speaker to be announced.**
- **January 10 Dinner Meeting: topic and speaker to be announced.**

For additional information and last minute meeting announcements, visit the Chapter website at [www.lacsea.org](http://www.lacsea.org).



### STAY CONNECTED TO CSEA!

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Member networking

[www.twitter.com/CASocietyEA](http://www.twitter.com/CASocietyEA)  
Tax links and breaking news

**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

- **January 7 One-Day Seminar: Cast-in-Concrete, with speaker Vicki Mulak, EA, CFP® and Claudia Hill, EA, MBA.**

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](mailto:office@missioneas.org). Visit the Chapter website at [www.missioneas.org](http://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.

- **December 15 Dinner Meeting in Novato: topic and speaker to be announced.**
- **January 12 Mini-Intensive: Partnerships and LLCs, with speaker Vicki Mulak, EA, CFP®, 6 - 9 p.m.** at the Inn Marin – 2 hours CE.
- **January 13 Seminar: Last Chance Federal and California Tax Updates, with speaker Vicki Mulak, EA, CFP®, 8 a.m. - 4:40 p.m.** at the Inn Marin – 6 Hours CE for IRS (tax topics), 8 hours CE for CTEC (federal and state), NAEA and CSEA.
- **January 24 Lunch Meeting in Santa Rosa: topic and speaker to be announced.**

For meeting and event details and reservations, visit the Chapter website at [www.NorthBayEA.org](http://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](mailto:MarinRegistrar@NorthBayEA.org); in Sonoma County, contact Gary Parodi, EA at [SonomaRegistrar@NorthBayEA.org](mailto:SonomaRegistrar@NorthBayEA.org). For information on Sonoma breakfast meetings, contact Joann DeVries, EA at 707-539-6070 or [SonomaBreakfasts@NorthBayEA.org](mailto:SonomaBreakfasts@NorthBayEA.org). For information on Marin breakfast meetings during tax season, contact [MarinTaxBreakfasts@NorthBayEA.org](mailto:MarinTaxBreakfasts@NorthBayEA.org).

### CSEA Events Calendar

[www.csea.org/education-events/calendar-of-events](http://www.csea.org/education-events/calendar-of-events)

**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**

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

- **December 20 Seminar: Tax Research, with speaker Mark Seid, CPA, EA, 12 p.m. - 4 p.m. – 4 hours CE.**
- **December 20 Dinner Meeting: IRS Collection Issues, with speaker Mark Seid, CPA, EA, USTCP, 7 p.m. - 8 p.m. – 1 hour CE.**
- **January 12 IRS-CSEA Practitioner Seminar in Anaheim: Hear from IRS representatives about policies and procedures that impact you and your clients, and learn how to maximize resources to increase your value to your clients, 8 a.m. - 4:30 p.m.** at the Embassy Suites Anaheim South, 11767 Harbor Blvd., Garden Grove – 7 hours CE. [Click here](#) for details, or call Joe Guccione, EA at 714-842-5285.

For Dinner Meeting details contact Christine Davidson, EA at [chris@ocnumberz.com](mailto:chris@ocnumberz.com). Visit the Chapter website at [www.eaoc.org](http://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.**

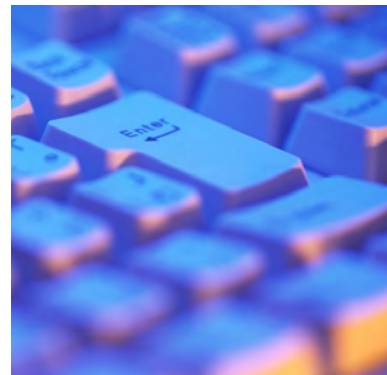
- **December 14 Dinner Meeting: Holiday Party.**

For meeting information call 760-744-4553 or email Paula Traber, CPA at [traber@cox.net](mailto:traber@cox.net). Visit the Chapter website at [www.cseapalamar.org](http://www.cseapalamar.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.

- **January 19 Dinner Meeting: Ethics, with speaker Carol Thompson, EA.**

Visit the Chapter website at [www.sacvalleyeas.com](http://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.

- **December 13 Dinner Meeting: topic and speaker to be announced.**
- **January 11 IRS-CSEA Practitioner Seminar in San Diego: Hear from IRS representatives about policies and procedures that impact you and your clients, and learn how to maximize resources to increase your value to your clients,** 8 a.m. - 4:30 p.m. at the Al Bahr Shrine Center, 5440 Kearny Mesa Rd., San Diego – 7 hours CE. [Click here](#) for details, or call Joe Guccione, EA at 714-842-5285.

For Dinner Meeting information and reservation requests, send email to [dinner@cseasandiego.org](mailto:dinner@cseasandiego.org) or call 619-345-4535. Visit the Chapter website at [www.cseasandiego.org](http://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.

- **December 12 Dinner and Valley Food Bank Meeting: Issues You Will Face in the Upcoming Filing Season, with speaker Lee T. Reams, BSME, EA. The Chapter is also conducting its annual food drive for the benefit of the Valley Food Bank at this meeting.** Bring your check book and make a cash donation. [Click here](#) for a wish list of items. Please contact Jennifer Coats, EA at [hikergal@sbcglobal.net](mailto:hikergal@sbcglobal.net) with questions or if you would like to help.
- **January 9 Dinner Meeting: topic and speaker to be announced.**

For Dinner Meeting reservations, visit the Chapter website at [www.sfvea.org](http://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.

- **December 21 Special Holiday Dinner and Meeting: Repair Regulations, with speaker Mark Seid, EA, CPA.**
- **January 13 IRS-CSEA Practitioner Seminar in Burbank: Hear from IRS representatives about policies and procedures that impact you and your clients, and learn how to maximize resources to increase your value to your clients,** 8 a.m. - 4:30 p.m. at the Pickwick Gardens, 1001 Riverside Drive, Burbank – 7 hours CE. [Click here](#) for details, or call Jamie Gibson, EA at 909-592-5326.
- **January 18 Dinner Meeting: Tax Updates, with speaker Vicki Mulak, EA, CFP®, 5 - 9 p.m.** at the Courtyard by Marriott, 700 W. Huntington Drive, Monrovia – 3 hours CE.

For membership information, email [membership@sgvea.org](mailto:membership@sgvea.org). Visit the Chapter website at [www.sgvea.org](http://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 p.m. at the Napa Elks Lodge, 2840 Soscol Ave., Napa.

- **January 14 Seminar: Tax Law Update for the CA Tax Professional, with speaker Vicki Mulak, EA, CFP®, 8 a.m. - 4:15 p.m.** at a location to be announced – 6 hours Federal Tax Law Updates and 2 hours CA Tax Law Updates.
- **January 24 Dinner Meeting: A Potpourri of 2016 Tax Changes (And how they affect your tax practice), with speaker Torie Charvez, EA.**

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.

- **The South Bay Chapter will offer a Special Enrollment Examination (SEE) course with instructors Nancy Thompson, EA and Diana Davis, EA.**
  - **Location & Time:** Andrade & Assoc. Inc., 2186 W. 190th St., Torrance, 9 a.m. - 5 p.m.
  - **Part 1, Individuals** - Saturdays, November 5 - December 17, 9 a.m. - 1 p.m.
  - **Part 3, Ethics & Procedures** - Saturdays, January 7 - January 28, 2017, 9 a.m. - 1 p.m.
  - **Part 2, Business Taxes** - Saturdays, May - June 2017, 9 a.m. - 1 p.m.

For more information, please contact Tim Elkins and/or Woody Ford at 310-618-1040 or [Tim@hlp4tax.com](mailto:Tim@hlp4tax.com).

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

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