



Big Valley Chapter Bulletin

California Society of Enrolled Agents

www.bigvalleycsea.org



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Monthly Newsletter Meeting Details

Where: **Barnwood Restaurant 338 E Main ST Ripon**
Right off Hwy 99 (209) 599-4324

When: **Thursday June 10, 2010**

Business Meeting ___ 4:30 P.M.

Networking _____ 5:30 P.M.

Dinner _____ 6:00 P.M.

Cost: Members: \$25 Reserved, \$30 at the Door
Guests: \$30 Reserved, \$35 at the Door

Reservations must be made the Monday before by 12 Noon.
If you make a reservation, you must cancel if you cannot attend.
Otherwise, you will be billed for the amount of the dinner.

Menu: Chef's choice, Seasonal Vegetables, Tossed Garden Salad, Rolls & Butter and Desert. Water, Tea, and soda provided.

PROGRAM

Kim Kastl, EA who is the incoming CSEA president will come to install officers and directors and give us a presentation on Representation – A Perspective From Both Sides of the Desk. Please read more about Kim and her presentation on page 2.

Please E-mail your reservations to Beverly Woodward at b-woodward@sbcglobal.net or call (209) 463-2427

National Association of Enrolled Agents Code of Ethics

1. An Enrolled Agent should, in personal and public life, strive to enhance the status of the profession and promote its qualifications to serve the public.

National Association of Enrolled Agents Rules of Professional Conduct

1. Members shall at all times conduct their professional practices within the rules of Treasury Department Circular 230 and the Rules of Professional Conduct of this Association.

SPECIAL INVITATION: The Chapter Board of Directors meets at **4:30** PM each month (except December) prior to the dinner meeting. All members are invited to attend and participate. Come and share your thoughts and ideas.

“The” Tax Professionals

PRESIDENTS MESSAGE *By Michael McGrath, EA*

We are nearing the time of the year that most of us use to get educated or at least updated on the new laws and their tax effect, tax issues or ways to deal with the IRS, FTB, EDD or BoE. Do you have your education in place yet? There are many programs available and it shouldn't be hard to find one that fits your needs. CSEA has Super Seminar, ClientWhys has a program coming up, the 2010 CSEA annual meeting has some good classes June 22 thru 25 as well as many other programs. If you haven't selected your Continuing Education program, you need to get it on your calendar soon.

In addition to the training from outside sources, our chapter provides meaningful training at the monthly meeting. If you have any ideas for subjects or issues, we'd like to hear from you. This is your chapter and you certainly can have input into what is presented.

May 31st is the day we, as a nation, recognize our Soldiers, Sailors, Marines, Airman and Coast Guardsmen, our guardians of our way of life. Take a few minutes to say thanks to them and if you have one in your family that has passed on, be sure to put some flowers on their grave. We didn't all volunteer, but we did what needed to be done at the time.

For those of you that did serve, thank you for your service. When you meet another service member, shake their hand and welcome them home and thank them for their service. Stay safe and welcome home.

This is the last President's Message from me. Kathy Rocha will be taking the reins after this month. I would like to thank all of you for all your support. It's been an interesting ride and I hope that I've been successful in your eyes. I hope that you will all support Kathy and help to make our chapter more successful. She has a lot of good ideas and will need your support and participation in order to make those ideas bear fruit.

Take care, stay safe and I hope to see you at the next meeting.

Respectfully Submitted Michael McGrath, EA President

In the news

IRS Offers Details on New Small Business Health Care Tax Credit

The Internal Revenue Service has announced new guidance to make it easier for small businesses to determine whether they are eligible for the new health care tax credit under the Affordable Care Act and how large a credit they will receive. The guidance makes clear that small businesses receiving state health care tax credits may still qualify for the full federal tax credit. Additionally, the guidance allows small businesses to receive the credit not only for regular health insurance but also for add-on dental and vision coverage. See Notice 2010-44 under Technical Guidance

Form to Claim Payroll Tax Exemption for Hiring New Workers Now Available

The Internal Revenue Service has announced issuing newly revised payroll tax form that most eligible employers can use to claim the special payroll tax exemption that applies to many new workers hired during 2010.

Check the web sites for more information

www.bigvalleycsea.org

www.irs.gov

www.ftb.ca.gov

www.csea.org

Friendly Reminder

- Be sure to join CSEA at the annual meeting in Rohnert Park June 21-25

PROGRAMS

May 13, 2010

Connie Lorz, EA spoke on the new 2010 Health Care Reform Act signed into law on March 23, 2010. What will it mean to us as Tax prepares and business owners? Connie gave us her insight at our meeting. Thanks Connie for the rousing discussion. **ARE YOU READY?**

June 10, 2010 Kim Kastl, EA Nominee for President of CSEA will come to install officers and talk to us about Audit Representation. The title is "Representation – A Perspective From Both Sides of the Desk ". Her plan is to share her personal representation tips as well as a few tidbits she has picked up in seminars recently. To find out more about Kim, read her attached bio and plan to attend our meeting.

Receive one hour of continued education for attending this meeting.

Be sure to plan for the upcoming meetings. Here is a list in progress of meeting education.

July 8, 2010 is open

August 12, 2010 Connie Ferrell, EA will come and talk about NOL's

September 9, 2010 Cathy Apker CSEA EVP will come and talk to us about Ethics for two hours. Fulfill your Ethics requirements with one meeting.

P L A N T O A T T E N D !

DOOR PRIZES

August 13, 2009 Elaine Bradbury won a Starbucks Gift Card.

September 10, 2009 Marilyn Lim won an air-filtering fan for the car or home.

October 8, 2009 Kelley Lackey won a bottle of wine

November 12, 2009 Tim Flavin won a heated travel coffee mug.

December 10, 2009 Everyone who attended received a wonderful holiday gift.

May 13, 2010 Rosa Felix won a nice bottle of wine

Come to a meeting for a chance to win!

Win-Win

The agenda has been set for the Win-Win meetings to be held in Modesto and Stockton. Richard Williamsen, EA and Michael McGrath, EA have volunteered to be in charge of these important meetings. The next meeting will be June 15 in Modesto at the IRS office 1533 Lakewood DR at 1:00 PM. The topic will be the Homebuyers Credit. The next Stockton meeting will be August 17 at Dana Mazzini's office 2027 Grand Canal Blvd Ste 24 Stockton 1:00 PM.

Plan to join and get involved with fellow EA's and IRS personnel and give a list of topics you would like to discuss at the meeting.

For more information contact Richard Williamsen 209/521-6566 taxrep@aol.com or Michael McGrath 209/579-5741 eagleconsulting@sbcglobal.net

☆☆☆☆☆ CALENDAR OF EVENTS ☆☆☆☆☆

Be Sure to mark your calendars!

June 2010

- 1-2 CSEA Board of Directors & committee meetings, Grand Sierra Resort & Casino, Reno, NV
- 3-5 Super Seminar Reno
- 10 Monthly Meeting Barnwood Restaurant Ripon Business meeting 4:30 PM Networking 5:30 PM Dinner 6:00 PM **Kim Kastl** install officers and Audit Representation.
- 15 **Win-Win** IRS Office 15333 Lakewood DR Modesto 1:00 PM
- 20 **Deadline for Big Valley Bulletin**
- 21-25 "Grape Expectations" CSEA Annual Meeting 2010 (North Bay) Double Tree Hotel Sonoma Wine Country, Rohnert Park CA
- 25 Chapter Presidents' Workshop, Rohnert Park, CA
- 26-27 CSEA Board of Directors & committee meetings, Rohnert Park, CA

July 2010

- 8 Monthly Meeting Barnwood Restaurant Ripon Business meeting 4:30 PM Networking 5:30 PM Dinner 6:00 PM
- 8 **Officers and Directors** Board Retreat Barnwood Restaurant 12:30
- 20 **Win-Win** Dana Mazzini's Office 2027 Grand Canal Blvd Ste 24 Stockton 1:00 PM
- 20 **Deadline for Big Valley Bulletin**

August 2010

- 12 Monthly Meeting Barnwood Restaurant Ripon Business meeting 4:30 PM Networking 5:30 PM Dinner 6:00 PM **Connie Ferrell, EA** will speak on NOL's
- 17 **Win-Win** IRS Office 15333 Lakewood DR Modesto 1:00 PM
- 20 **Deadline for Big Valley Bulletin**

2010-11 Nominations

The nominating committee has been busy putting together the list for 2010-11 board members. There is still room.

President - Kathy Rocha, EA
Vice President - Tim Flavin, EA
Treasurer - Allen Farnum
Secretary - Michael Cash

Directors:

S. Jean Ford
Rosa Felix
Marilyn Lim
Beverly Woodward
Sunny Binning

Be sure to come to the June meeting and watch the installation.

Continued Education

This year Big Valley has partnered once again to provide some quality education that benefits you by helping fulfill your continued education requirements and benefits Big Valley by sharing the registration fees. This year we have:

September 23, 2010 Town Hall meeting in Sacramento for 7 hours of continued education.

November 17 & 18 Clientwhys 1040 Review and Update seminar for 16 hours of continued Education. (Flyer attached)

The Monthly Bulletin is available by E-Mail, FAX or US Mail (if you do not have E-Mail.). Just give your information to Tim Flavin. Also please send E-Mail address changes to Tim Flavin 209/532-4053 FAX 209/532-5209 E-Mail tim@flavinea.com

IT'S YOUR BULLETIN, MAKE IT SHINE!



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To:

ADDRESS CORRECTION REQUESTED

Enrolled Agents
FEDERALLY RECOGNIZED TAX PROFESSIONALS
“The” Tax Professionals