



# Big Valley Chapter Bulletin

California Society of Enrolled Agents

[www.bigvalleycsea.org](http://www.bigvalleycsea.org)



## Officers

### President

**Kathy Rocha, EA**

(209) 667-7012

[polousbusiness@aol.com](mailto:polousbusiness@aol.com)

### Vice President

**Tim Flavin, EA**

(209) 532-4053

[tim@flavinea.com](mailto:tim@flavinea.com)

### Secretary/Historian

**Michael Cash, EA**

(209) 523-2575

[MichaelSCashEA@aol.com](mailto:MichaelSCashEA@aol.com)

### Treasurer

**Al Farnum, EA**

(209) 957-3361

[alsilvershadow@comcast.net](mailto:alsilvershadow@comcast.net)

### Immediate Past President

**Michael McGrath, EA**

(209) 579-5741

[eaqleconsulting@sbcglobal.com](mailto:eaqleconsulting@sbcglobal.com)

## Directors

**Marilyn Lim, EA**

(209) 478-0714

[jimarilyn@aol.com](mailto:jimarilyn@aol.com)

**Beverly Woodward, EA**

(209) 463-2427

[b-woodward@sbcglobal.net](mailto:b-woodward@sbcglobal.net)

**Rosmarie Sy, EA**

(209) 823-8698

[rose\\_sy@msn.com](mailto:rose_sy@msn.com)

**Sunny Binning, EA**

(209) 365-7303

[ssbinning@yahoo.com](mailto:ssbinning@yahoo.com)

**Shirley Ford, EA**

(209) 462-7103

[sjford@aol.com](mailto:sjford@aol.com)

### Representative to CSEA Board

**Tim Flavin, EA**

(209) 532-4053

### PIA Representative

**Sunny Binning, EA**

(209) 365-7303



## Monthly Newsletter Meeting Details

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

When: **Thursday July 8, 2010**

Board Retreat \_\_\_\_\_ 12:30 P.M.

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

**Michael Cash, EA** Will give us a presentation on "Reading Tax Court Cases Can Be Fun". He will touch on the highlights of cases that he has put links to on our chapter web site. He will give a quick look at all the fresh ones searching for gems of wisdom.

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

## Theme Night

This month we will have a theme night and the theme is patriotic. Dress in your best Red White and Blue and show us how patriotic you are.

**New President of CSEA Kim Kastl, EA**

**New First Vice President of CSEA Jean Nelson, EA**

**New Second Vice President of CSEA Raven Deerwater, EA**

**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 Kathy Rocha, EA*

My first President's Message – it's a lot of pressure to think of something great and worthy of all of you, but I'm going to try to make it entertaining! I am very excited about this upcoming year and the team of officers that are serving Big Valley. We have some grEAt ideas and we will begin planning our strategy to get it all done. I encourage each one of you to find out what your part can be and get involved in the Chapter in the area that most interests you. As those of you who have met me know, I love to get people involved! Our Board Retreat and Strategic Planning will be before next month's board meeting – join us!

As I write this, I reflect on the World Cup match that I watched this morning between Portugal and North Korea. I think Big Valley and CSEA have a lot in common with the Portuguese soccer team. Now some of you might think I'm stretching to correlate between soccer players and Enrolled Agents, but I beg you to humor me. Portugal did some amazing work today, they started off strong, as did North Korea, and were aggressive in their pursuit of the ultimate desire of any match, to score. They ended the half with a goal in their pocket and the hope of more to come. In the second half, again, they started strong after stunning their opponent in the first and then in a string of excellent passes and assists, went on to score six more goals to win the game 7-0.

Now, what does this have to do with Enrolled Agents? Well, first I wanted to let you know that Portugal won! ☺ But this story can also serve as a model for what we have to do as Enrolled Agents and Members of the Big Valley Chapter of the California Society of Enrolled Agents. We have a big match coming up, the Federal Regulation of Tax Preparers. We need to be prepared, we need to be aggressive, and we need to score early on to get the edge against our competition. If we can make it through this first half ahead of the rest, then we can score and win in the second and continue to be the successful organization that we are. There were still be other matches, other obstacles that will arise, but we are already the best in our profession and we can meet all of these challenges. We need to lay all the groundwork now in order to grow our Chapter and CSEA to be ready for what's ahead.

There will be mandatory registration by the end of the year for all tax preparers, including Enrolled Agents. We are required to "refresh" our existing PTINs and pay a fee in order to be eligible to file tax returns in 2011. The details are still coming out from the Office of Professional Responsibility (OPR) at IRS, but we know that registration is set to begin in September, that everyone not currently covered under Circular 230 will have a 3-year time period to pass a competency test(s) in order to prepare tax returns and we know that we have a tremendous opportunity to educate the public and grow our membership. CSEA has already sent out 14,000 letters to unenrolled tax preparers in California and approximately 400 have already joined as professional associates across the state. Let's continue with this aggressive pursuit, let's make our mark as a Chapter. Come to the Chapter meetings, bring your ideas, concerns, voices. It's never been more important for us to play as a team and to all have the same game plan.

We, as a Chapter, need to continue to support Big Valley and CSEA in activities that bring information to the general public about our profession and specifically the advantages that using an Enrolled Agent can give a taxpayer. As individuals, we need to continue to educate those around us about the Enrolled Agent profession. There will be numerous opportunities this year to get involved in Public Information & Awareness (PIA) activities such as sports games, and we are planning local legislative visits leading up to Legislative Day in Sacramento. Don't miss these opportunities to support our Chapter and your profession. Answer the call! We're going to need your support to make this year GrEAt!

Another thing I learned in today's game was the same lesson that Portugal's Captain, Cristiano Ronaldo learned. Ronaldo is an incredible player, one of the best in the world and all eyes are on him at these matches, but until he was gracious, and really worked for the success of his fellow players, the win wasn't attainable. Many commentators said that today he grew up; he understood the meaning of teamwork, and in giving his colleagues his all, he really won. We need to apply the same lesson. We are all amazing professionals, and the best at what we do. Coming together and bringing the energy, the expertise, the knowledge, will empower us to win as a team.

I look forward to working with all of you in this coming year to educate the public about Enrolled Agents, to grow our Chapter and organization and to make things happen. We have always had an amazing history at Big Valley, I can only hope to add to what my predecessors have already done, but I know that I can't do it alone. I will need a team that I can assist in getting the job done. I thank you for your confidence in me, all of the mentoring that I have received at Big Valley and for the patience you all have shown in getting to the end of this message with all of the soccer references. I can't wait to get started!

### **Check the web sites for more information**

[www.bigvalleycsea.org](http://www.bigvalleycsea.org)

[www.irs.gov](http://www.irs.gov)

[www.ftb.ca.gov](http://www.ftb.ca.gov)

[www.csea.org](http://www.csea.org)

### **PROGRAMS**

**June 10, 2010** Kim Kastl, EA now President of CSEA came and installed our officers and talked to us about Audit Representation. The title was "Representation – A Perspective From Both Sides of the Desk". She shared her personal representation tips as well as a few tidbits she has picked up in seminars recently. Kim's unique look at audit representation gave all in attendance a fresh view of how to handle audits. **Thanks Kim and congratulations!**

**July 8, 2010** Michael Cash, EA will come and give a presentation on how to look for tax court cases to read because it is worth the trouble.

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.

**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 Stockton meeting will be July 20th at Dana Mazzini's office 2027 Grand Canal Blvd Ste 24 Stockton 1:00 PM. The next Modesto meeting will be August 17th in Modesto at the IRS office 1533 Lakewood DR at 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](mailto:taxrep@aol.com) or Michael McGrath 209/579-5741 [eagleconsulting@sbcglobal.net](mailto:eagleconsulting@sbcglobal.net)

## ☆☆☆☆☆☆ CALENDAR OF EVENTS ☆☆☆☆☆☆

Be Sure to mark your calendars!

### July 2010

- 8 Monthly Meeting Barnwood Restaurant Ripon Business meeting 4:30 PM Networking 5:30 PM Dinner 6:00 PM **Michael Cash, EA** will speak on tax court cases research.
- 8 **Officers and Directors** Board Retreat Barnwood Restaurant 12:30 P.M.
- 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**

### September 2010

- 9 Monthly Meeting Barnwood Restaurant Ripon Business meeting 4:30 PM Networking 5:30 PM Dinner 6:00 PM **Cathy Apker EVP** for CSEA will give a 2 hour Ethics Presentation.
- 20 Tax Practitioner/IRS Town Hall Meeting San Jose
- 20 **Deadline for Big Valley Bulletin**
- 21 **Win-Win** Dana Mazzini's Office 2027 Grand Canal Blvd Ste 24 Stockton 1:00 PM
- 22 Tax Practitioner/IRS Town Hall Meeting Fresno
- 23 **Tax Practitioner/IRS Town Hall Meeting Sacramento**
- 24 State Tax Agency Liaison Meeting Sacramento
- 25-26 CSEA Board Meetings Sacramento

## Congratulations Kathy Rocha, EA

Big Valley would like to extend a heartfelt congratulations to Kathy Rocha, EA for two reasons.

First for being elected as President of Big Valley.

Second for receiving a Letter of Commendation that was presented to her by Connie Ferrell, EA at our last meeting after she was sworn in as president of Big Valley by Kim Kastl.



## 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. (Flyer attached)

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](mailto:tim@flavinea.com)*

**IT'S YOUR BULLETIN, MAKE IT SHINE!**



T. Flavin, EA – Editor  
BIG VALLEY CHAPTER CSEA  
P.O. Box 850  
Soulsbyville CA 95372-0850  
Tel (209) 532-4053 FAX (209) 5209  
E-Mail [tim@flavinea.com](mailto:tim@flavinea.com)

To:

ADDRESS CORRECTION REQUESTED

Enrolled Agents  
FEDERALLY RECOGNIZED TAX PROFESSIONALS  
"The" Tax Professionals