

# CSEA News & Events

Chapter Education and Events

Vol. 8, Issue 6 • December 2015

*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 3 Holiday Gala Celebration:** 5:30 p.m. at Chez Shari, 305 N. Union Rd. in Manteca. Please email your reservations to Catherine Korelin, EA at [cathikorelin@sbcglobal.net](mailto:cathikorelin@sbcglobal.net) or call 209/589-7326.
- **January 14 Dinner Meeting: Repair Expense, Practical Examples & Case Studies,** with speaker **Cameron Hess, CPA** – 2 hours CE.
- **There will be no meetings February through March, 2016.**
- **May 12 Dinner Meeting:** Alan Pinck, EA will speak on a topic to be announced, 5:30 - 8:30 p.m. – 1 hour CE. Optional dress code theme night: TBD.
- **June 9 Dinner Meeting: Collections,** with speaker **Michael Cash, EA**, 5:30 - 8:30 p.m. – 1 hour CE. Optional dress code theme night: TBD.

For Dinner Meeting reservations, please contact Catherine Korelin, EA at [cathikorelin@sbcglobal.net](mailto:cathikorelin@sbcglobal.net) or call 209/589-7326. 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.

In lieu of a regular meeting in December, the Chapter hosts a Gear Up Trust seminar (8 hours CE) on December 10 & 11 (two half-day sessions).

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 (formerly Pelican Point), 2575 Price Street, Pismo Beach.

- **December 16 Dinner Meeting: Join us for an interactive Ethics program,** with speaker **Torie Charvez, EA**. The deadline to RSVP is December 6, since this is a special Holiday meeting and attendees will have a choice of entree. We will also have complimentary wine and sparkling cider.

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 3 Dinner Meeting: Circular 230: What You Don't know CAN Hurt You,** with speaker **Jennifer Mac-Millan, EA** – 2 Federal hours CE.
- **December 14 Brass Tax Seminar: Tuneup/Update,** with speakers **Michael Paul Karll, EA, CFP®, MBA** and **Lisa Ihm, EA**, at the Sheraton Four Points Harbortown Resort, 1050 Schooner Drive, Ventura – 8 hours CE. For more information, contact Russ Merrick, EA at [taxEAgent@aol.com](mailto:taxEAgent@aol.com).
- **January 7 Dinner Meeting: California Tax Updates,** with speaker **Susan Maples, CPA, FTB Taxpayer Advocate**.
- **February 4 Dinner Meeting: Preparing Tax Returns for Illegal Business Activities,** with speaker **Dale Machalleck, EA**.
- **May 5 Dinner Meeting: \$1031 Exchanges,** with speaker **Margaret Kehoe, EA**.
- **June 13, All Day Seminar co-sponsored with the San Fernando Valley Chapter: Representation Seminar,** with speaker **Robert E. McKenzie, EA, Esq.** at Airtel Plaza Hotel & Conference Center, 7277 Valjean Avenue, Van Nuys. For more information, contact Channel Island Chapter representative Nancy Huapaya, EA by phone at 805/816-6860, fax to 805/604-9208, or email to [dfast9@hotmail.com](mailto:dfast9@hotmail.com); or email San Fernando Valley Chapter representative Larry Gurewitz, EA at [larrylife@gmail.com](mailto:larrylife@gmail.com). Additional details are also available at [www.sfvea.org](http://www.sfvea.org).
- **July 7 Dinner Meeting: Foreign Earned Income, the FTC & FBARs,** with speaker **David E DuVal, EA**.
- **September 1 Dinner Meeting: Retirement Plans for the Self-Employed,** with speaker **Vicki Mulak, EA, CFP®**.
- **November 3 Dinner Meeting: NOLs,** with speaker **Mark Seid, EA, TCP**.

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.

## STAY CONNECTED TO CSEA!

[www.facebook.com](https://www.facebook.com/CSEAnewsandphotos)  
CSEA news & photos

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

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

**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 Andy Rogers, EA at 510/332-0401 or email [Andy@TaxBuddha.com](mailto:Andy@TaxBuddha.com).

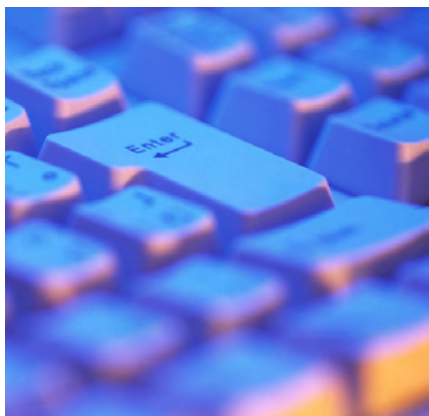
- **December 16 Dinner Meeting: Same Sex Marriages, with speaker Cynthia Leachmoore, EA.**
- **January 20 Dinner Meeting: Trust Administration, with speaker Scott Haislett, CPA.**

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 2 Redding Roundtable: topic and speaker to be announced.**
- **Chico Roundtable Meetings are held from 8:00 a.m. - 9:00 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 3 Chico Roundtable: Data Theft and Protecting Client Tax Information, with speaker James Webster, EA.**
- **January 7 CalFed Last Chance Seminar: This seminar provides 5 hours of California Updates and 3 hours of Federal Updates**
  - Form 433-A, Collection Information Statement for Wage Earners and Self Employed Individuals
  - Determine the amount to be offered to compromise the tax liability8 a.m. - 5 p.m., at the Win River Casino, 2100 Redding Rancheria Rd., Redding 8 hours CE. [Click here](#) for details and to register.

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 4 San Francisco tEAm Meeting:** 8 a.m. at Boulevard Cafe, 2 Poncetta Drive, Daly City. Call Gordon Dito, EA for more information at 650/552-9200 or email him at [gdito@ditoassociates.com](mailto:gdito@ditoassociates.com).
- **December 11 Peninsula tEAm Meeting:** 8:30 a.m. at the offices of Southward & Associates, 129 Laurel Street, San Carlos (entrance at 132 El Camino Real). For more information, please contact Amanda Boston, EA at 650/591-9661.

**Please note: tEAm meetings are for Golden Gate Society (GGSEA) Members only – all current GGSEA Members are invited to attend.**

- **December 17 Membership Meeting: 1099 Issues for Schedule C Filers, with speaker Torie Charvez, EA.** Learn what to do if your client makes an error, and how to handle representation when the IRS comes calling.

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 9 Dinner Meeting: Ethics, with Daniel W. Layton, Esq.**

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

### The CSEA Online Store

From a great new Enrolled Agent brochure to EA license plate holders, proudly proclaim your Enrolled Agent status and your affiliation with CSEA, the preeminent professional organization for Enrolled Agents.

**Click here to check out great CSEA & Enrolled Agent merchandise.**



**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 8 Dinner Meeting: New Tangible Property Regulations and Tax Accounting Methods, with speaker Robert A. Scharlach, Director, Federal Tax Accounting Methods and Credit, KPMG.**

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

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.

- **December 10 MSEA Education Committee Meeting:** 1 p.m. - 2:30 p.m. at the Willow Glen Library, 1157 Minnesota Ave., San Jose.
- **December 15 Lunch Meeting:** topic and speaker to be announced.

For education and event information, contact the MSEA office at 800/832-6732 or [office@missionneas.org](mailto:office@missionneas.org). Visit the Chapter website at [www.missionneas.org](http://www.missionneas.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 9 (Wednesday) Dinner Meeting in Novato: Social Security Update, with speaker Richard Ogg, EA – 1 CE hour for NAEA and CSEA. Please note that the meeting day and date have been changed to match site availability.**
- **January 15 Seminar: Last Chance Federal & California Update, with presenter Vicki Mukak, EA CFP®, 8 a.m. - 4:30 p.m. at the Inn Marin. Click here for details and to register.**

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).

**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.

- **December 15 Dinner Meeting: Meet and Greet CSEA President,** at the Phoenix Club – no CE for this event.
- **January 19, 2016 Dinner Meeting: Quickfinder Update,** at the Phoenix Club.
- **February 16, 2016 Dinner Meeting: California Update,** at the Phoenix Club.
- **May 17, 2016 Dinner Meeting: FTB Taxpayers' Rights Advocate Susan Maples, CPA will speak on a topic to be announced.**

For Dinner Meeting details contact Joe Guccione, EA, CFP® at 714/842-5285 or [gucci-one@msn.com](mailto:gucci-one@msn.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.**

- **January 20 Dinner Meeting: 2015 Federal & California Tax Update.**
- **February 17 Dinner Meeting: Tax Topics Roundtable.**
- **There will be no Dinner Meeting in March.**

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

- **January 21, 2016 Dinner Meeting: Ethics, with speaker Carol Thompson, EA.**
- **May 19, 2016 Dinner Meeting: Tax Issues in the Marijuana Industry, with speaker Ruth Rowlette, EA, Esq.**

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.

- **November 10 Dinner Meeting: Fees in the Financial Services Industry and How to Navigate; Abuse Trading v. Market Returns, with speakers Barbara Norman, ChFC and Erwin Shustak, Esq.**
- **December 8 Dinner Meeting and Holiday Party: Stock Options with Tim Callan and Trevor Callan – 1 hour CE + 1 Hour of Entertainment.**
- **January 12 Dinner Meeting: Reverse Mortgages and Other Tools to Assist Your Clients, with speaker Peter Moss, CPA of Wymac Capital – 2 hours CE.**

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** meets the second Monday of every month, except February through April, at 6:15 p.m. at the Airtel Plaza Hotel, 7277 Valjean Ave., Van Nuys.

- **December 14 Dinner Meeting: Tax Checklist for Knotty Divorces, with Eva Rosenberg, EA – 2 hours CE.**
- **January 11 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 16 Mini-Seminar: The Whole Enchilada, with speaker Vicki Mulak, EA, CFP® – 1-5 p.m., at the Embassy Suites by Hilton, 211 Huntington Dr., Arcadia.**
- **December 16 Dinner Meeting: The Section 754 Form 1065 Adjustments, with speaker Vicki Mulak, EA, CFP® – 2 hours CE.**
- **January 15 IRS-CSEA Practitioner Seminar: Topics include:**
  - OIC and Installment Agreements
  - Subchapter S Corps
  - Identity Theft: Data thefts
  - Franchise Tax Board - California tax law updates
  - Taxpayer Advocate Service
  - Hot Topics from IRS8 a.m. - 4:30 p.m. at the Pickwick Gardens, 1001 Riverside Drive, Burbank – 7 hours CE. [Click here](#) to register.
- **January 20, 2016 Dinner Meeting: Update for CA Preparer, with speaker Vicki Mulak, EA, CFP® – 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. - 2:00 p.m. at the Napa Elks Lodge, 2840 Soscol Ave., Napa.

- **December 8 Christmas Party: 6 p.m. - 9 p.m. at the Courtyard by Marriott, 1350 Holiday Lane, Fairfield.**
- **December 17 Lunch Meeting: Join us for a Christmas Party at the Napa Elks Lodge.**

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.

- **January 21 Last Chance Update Seminar: Federal and State Updates and Last Minute Changes for the 2015/2016 Tax Season, with speaker Vicki Mulak, EA, CFP® – 6 hours Federal CE; 2 hours CA CE.**

For additional information or to register, 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 [greg-cashtaxplus1@charter.net](mailto:greg-cashtaxplus1@charter.net). Visit the Chapter website at [www.sobaycsea.org](http://www.sobaycsea.org).

### CSEA Events Calendar

**December 2-3, 2015, digiTAX Webinar:  
Schedule A: From Top to Bottom Inside Out**

**December 9, 2015, digiTAX Webinar:  
Schedule C: Under Construction – Hard Hats Only!**

**January 9-10, 2016, CSEA Board and Committee Meetings  
Sacramento, CA (preceding Jim Stern Legislative Day)**

**January 11, 2016, Jim Stern Legislative Day  
Sacramento, CA**

**January 27, 2016, digiTAX Webinar:  
Tangible Property Regulations Update**

**May 17-19, 2016, 34th Annual Super Seminar – Las Vegas  
Rio All-Suite Hotel & Casino, Las Vegas, NV**

**June 1-3, 2016, 34th Annual Super Seminar – Reno  
Grand Sierra Resort & Casino, Reno, NV**

**July 6-8, 2016, CSEA 40th Annual Meeting  
Embassy Suites Ontario Airport, Ontario, CA**

**July 9-10, 2016, CSEA Board and Committee Meetings  
Embassy Suites Ontario Airport, Ontario, CA (following  
the Annual Meeting)**

Visit the CSEA Calendar of Events at  
[www.csea.org/education-events/calendar-of-events](http://www.csea.org/education-events/calendar-of-events).