

CSEA News & Events

Chapter Education and Events

Vol. 8, Issue 5 • November 2015

For detailed information on Chapter continuing education credits, please visit each 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.

- **November 12 Dinner Meeting: Tax Court, with speaker Linda Bossard, EA, USTCP, 5:30 - 8:30 p.m. – 1 hour CE.** Optional dress code theme night: Harvest.
- **November 18-19 Seminar: 1040 Review & Update, in partnership with ClientWhys, at the Stockton Hilton Hotel, 2323 Grand Canal Boulevard – 16 hours CE plus up to 13 hours of bonus self-study.** Call 800/442.2477 x1 to reserve your seat or register online at www.taxcpe.com. Remember to mention Big Valley Chapter in the notes field at checkout.
- **December 3 Holiday Gala Celebration: details to be announced.**
- **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 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.

In lieu of a regular meeting in November and December, the Chapter hosts a two-day ClientWhys seminar (16 hours CE) on November 17 & 18, and a Gear Up Trust seminar (8 hours CE) on December 10 & 11 (two half-day sessions).

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

- **November 18 Dinner Meeting: Capitalization and Repair Regulations - Looking Forward, with speaker Marc Owens, EA – 1 hour CE.**

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

- **November 3-4 Seminar: 1040 Review & Update, in partnership with ClientWhys, at the Marriott Courtyard Hotel – 16 hours CE plus up to 13 hours of bonus self-study.** Register online at www.taxcpe.com. Remember to mention Channel Islands Chapter in the notes field at checkout.
- **November 5 Dinner Meeting: The ACA Mandates-Outreach & Enforcement, with speakers IRS Stakeholder Liaison Kristen Deazeley and IRS Tax Compliance Officer Supervisor Orlando Hernandez – 2 Federal hours CE.**
- **December 5 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.
- **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.**
- **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; or email San Fernando Valley Chapter representative Larry Gurewitz, EA at larrylife@gmail.com. Additional details are also available at www.sfvea.org.
- **July 7 Dinner Meeting: Foreign Earned Income, the FTC & FBARs, with speaker David E DuVal, EA.**

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.

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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.

- **East Bay is having our Annual Fall Seminar, "Tax Talk 2015" on November 4, 5 and 6 at the Holiday Inn in Dublin – 24 Hours of Continuing Education including 2 Hours of Ethics.** Please visit the East Bay website at www.ebaea.org for additional details.
- **November 18 Dinner Meeting: topic and speaker to be announced.**

Visit the Chapter website at 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.

- **November 4 Board Meeting via Conference Call.** For more information, contact Karol Read at 530/894-4041.
- **November 12-13 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: The Essential 1040, K-1s for Form 1120S.
 - Day 2: Introductions to Trusts and Form 1041.[Click here](#) for more information.
- **November 12 FNCC Annual Dinner Meeting will be held starting at 5 p.m. on Thursday, November 12 at Rolling Hills Casino in Corning immediately following the first day of the Federal Tax Law Topic Update.**
- **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.
 - **November 4 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.
 - **November 5 Chico Roundtable: Penalty Abatements, with speaker Cap Porterfield, EA.**

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.

- **Peninsula tEAm Meeting:** Please note there will be no Peninsula Team Meeting in November – please attend the Tax Talk After Hours as part of the Golden Gate Fall Update Seminar. For more information please contact Amanda Boston, EA at 650/591-9661.
- **November 20 San Francisco tEAm Meeting:** 8 a.m. at Boulevard Cafe, 2 Poncetta Drive, Daly City. Call Rico Delodovici, EA for more information at 650/219-2774.

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

- **November 12-13, 2015 Fall Seminar – 31st Annual CPE by the Bay.** Mark your calendar – Registration is open and special pricing is available to all Members of CSEA. Go to www.ggcea.org for more details.
- **November 19 Membership Meeting: topic and speaker to be announced.**

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.

- **November 10-11 Seminar: 1040/540 Review & Update, in partnership with ClientWhys,** at the DoubleTree by Hilton Hotel Ontario - Airport, 222 North Vineyard Avenue – 16 hours CE plus up to 13 hours of bonus self-study. To register, call 909/466-7466 or visit www.clientwhys.com. Remember to mention Inland Empire Chapter in the notes field at checkout.
- **November 11 Dinner Meeting: Undisclosed Foreign Bank Accounts: How to Cure,** with Jeffrey B. Hahn, Esq.
- **December 9 Dinner Meeting: Ethics,** Daniel W. Layton, Esq.

Visit the Chapter website at www.ietaxpro.org.

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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.

- **November 10 Mini-Seminar: Non-Filers, Penalty Abatement and OIC/Installments, with speaker Mark Seid, EA, CPA.**
- **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.

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.

- **November 12 MSEA Education Committee Meeting:** 1 p.m. - 2:30 p.m. at the Bascom Branch Library / Community Center, 1000 S. Bascom Ave., San Jose.
- **November 17 Lunch Meeting: topic and speaker to be announced.**

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.

- **November 3 Seminar: Winery and Vineyard Tax Accounting, presented by David Pardes, CPA of PricewaterhouseCoopers LLC,** at the Foxtail Golf Club, 100 Golf Course Drive, Rohnert Park – 8 hours CE for EAs and CPAs; 8 hours Federal CPE for CRTs; 6.66 hours CPE for attorneys. For more information, contact WinerySeminarChair@NorthBayEA.org. To register, visit www.NorthBayEA.org.
- **November 19 Marin Dinner Meeting: Employer Tax Compliance, with speaker Jay Putnam, labor lawyer – 1 CE hour for IRS (Tax Topics), CTEC (federal), NAEA and CSEA.**
- **November 24 Santa Rosa Lunch Meeting: Tax Identity Theft, with speaker Vivienne Antal, IRS Stakeholder Liaison – 1 CE hour for IRS (Tax Topics), CTEC (federal), NAEA and CSEA.**

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.

- **IRS Representation Series Seminars, 8 a.m. - 4:30 p.m.** at National University, 3390 Harbor Blvd, Costa Mesa:
 - **November 7, Part 1 - IRS Appeals Process, presented by Bryan Gates, EA – 8 hours CE.**
 - **November 14, Part 2 - Tax Resolution Essentials, presented by Peter Stephan, CPA – 8 hours CE.**
 - **November 21, Part 3 - IRS Examination Case Studies, presented by Alan Pinck, EA – 8 hours CE.**

Please contact David Hilliard, EA at dmhilliard@gmail.com or 714/609-1486 for more information.

- **November 13 Seminar: "ACE"ing Schedules A, C, E," with speaker Torie Charvez, EA, at National University.**
- **Nov 14 Seminar: Tax Resolution Essentials, at National University.**
- **November 17 Dinner Meeting: topic and speaker to be announced, at the Phoenix Club.**
- **November 20 Seminar: IRS Exam Case Studies, at National University.**
- **December 15 Dinner Meeting: Meet and Greet CSEA President, at the Phoenix Club – no CE for this event.**
- **January 19, 2016 Dinner Meeting: Quickfinder/Tax Book Fed Updates, at the Phoenix Club.**
- **February 16, 2016 Dinner Meeting: California Update, at the Phoenix Club.**

For Dinner Meeting details contact Ken Noland, EA, at 714/505-1925 or ken@companycfo.com. Visit the Chapter website at www.eaoc.org.

Chapter Education and Events

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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.**

- **November 18 Dinner Meeting and 6-hour Education Workshop: "Business Entity Selection & Dissolution," presented by Vicki Mulak, EA, CFP®; includes how to choose an entity, and then how to dissolve it, regarding LLC, Partnership, C or S Corporation and LLC Dissolution – 1:30 - 8:30 p.m.** Following the workshop we will have our normal dinner meeting. Vicki will begin at 6 p.m. speaking on the topic of "LLC Dissolution."
 - Early bird pricing = \$110 Members/\$130 non-Members (until October 31, 2015)
 - Regular price = \$120 Members/\$150 non-Members
 - Price includes dinner, appetizers and soft drinks/tea/coffee.

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.

- **November 5 Mini-Seminar: Tax Strategies for S Corps and Blunders That Can Derail Them, with speaker Randy Roth, EA, MSFS, CSA,** at Incompass Tax, 4600 Roseville Road, Ste. 260, Sacramento – 3 hours CE.
- **November 12 Mini-Seminar: Taxation & Estate Planning Strategies Tax Preparers Need to Know, with speaker Amy Heavey Halloran, Esq.,** at Incompass Tax – 3 hours CE.
- **November 19 Dinner Meeting: Schedule D Down and Dirty, with speaker Torie Charvez, EA.**
- **November 19 Mini-Seminar: Choice of Business Entity, with speaker Torie Charvez, EA,** at Incompass Tax – 3 hours CE.

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.

- **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: Stock Options with Tim Callan and Trevor Callan – 1 hour CE + 1 Hour of Entertainment.**

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 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.

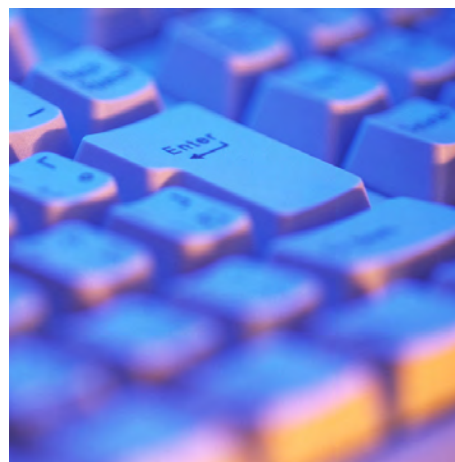
- **November 5-6 Seminar: 1040 Review & Update, in partnership with ClientWhys,** at the Airtel Plaza Hotel, 7277 Valjean Avenue, Van Nuys – 16 hours CE plus up to 13 hours of bonus online self-study. Call 800/442-2477 x1 to reserve your seat or register online at www.taxcpe.com. Remember to mention SFVEA in the notes field at checkout. [Click here](#) to download the flyer.
- **November 9 Dinner Meeting: topic and speaker to be announced.**

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.

- **November 2-3 Seminar: 1040 Review & Update, in partnership with ClientWhys,** at the Embassy Suites Hotel, 211 East Huntington Drive, Arcadia – 16 hours CE plus up to 13 hours of bonus online self-study. Call 800/442-2477 x1 to reserve your seat or register online at www.taxcpe.com. Remember to mention SGVEA in the notes field at checkout.
- **November 18 Dinner Meeting: A Change of Heart – Modifying CA Trusts, with speaker Phil Roitman, Esq.** – 2 hours CE.
- **December 16 Mini-Seminar: The Whole Enchilada, with speaker Vicki Mulak, EA, CFP® – 1-5 p.m.,** location to be announced.
- **December 16 Dinner Meeting: The Section 754 Form 1065 Adjustments, with speaker Vicki Mulak, EA, CFP® – 2 hours CE.**
- **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. Visit the Chapter website at www.sgvea.org.



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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.

- **November 17 Dinner Meeting: Answering Social Security Questions, with speaker Richard Ogg, EA**, at the Napa Elks Lodge, 2840 Soscol Avenue, Napa. The Board Meeting begins at 4:00 p.m., Networking at 6:00 p.m., Dinner at 6:30 p.m., and Presentation at 7:20 p.m.

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.

- **November 13-14 Workshop: Tax Practice Management, with facilitators Barbara Willingham, EA and Penny Van der Meer, EA** – 2 Hours Ethics CE.
- **November 17 Dinner Meeting: Stock Options, with speaker Rod Coutts, EA** – 2 Federal hours CE.

For additional information or to register, visit the South Bay Chapter website at www.sobaycsea.org. For Chapter information contact Greg Cash, EA at 562/597-4300, or email greg-cashtaxplus1@charter.net. Visit the Chapter website at www.sobaycsea.org.



CSEA Events Calendar

November 4, 2015 – CSEA/IRS Federal Representation Workshop, Laguna Niguel, CA

November 12-13, 2015 – Pen to Paper Tax Intensive: International Tax Issues, Irvine

December 2-3, 2015
digiTAX Webinar:
Schedule A: From Top to Bottom Inside Out & Between the Cracks

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.