



Golden Gate Chapter Newsletter

California Society of Enrolled Agents

February 2010

www.ggcea.org

Monthly Chapter Meeting

Thursday February 4, 2010

The Golden Gate Chapter proudly presents:

LYNN FREER, EA

**RECENT CHANGES TO CALIFORNIA LAW
YOU NEED TO KNOW**

Lynn Freer, EA is the premier presenter of California tax information in the country.

Ms. Freer headed her own EA firm in Orange County for many years. A researcher, writer, and speaker, Ms. Freer also owns and operates Spidell Publishing which currently produces the California Tax Newsletter, the Elder Care Planner, and a plethora of tax and business/financial books. Her expertise is enhanced by her ongoing research and networking with the various tax departments in Sacramento.

- * What about conformity or non- conformity, that is the question
- * Prepare for March use tax letters
- * Understand withholding problems
- * Learn about the new California credits
- * Hear all about the good, the bad, and the ugly about California tax laws

Grosvenor Airport Inn

380 South Airport Blvd., South San Francisco

4:30 pm Board Meeting - All Members Are Welcome

6:00 pm Social/Networking

6:45 pm Dinner

7:30 pm Continuing Education

Dinner: Stuffed Pork Tenderloin Vegetarian: Vegetarian Wellington

Dessert: Brownie

No Host Bar & No Host Wine

*Make your required dinner reservation by **Midnight, Monday, February 1, 2010.***

Register at www.ggcea.org

Please make your reservations as early as possible. We would appreciate credit card payments. Cash & Checks can be delivered at the door. If you miss a meeting your payment will be carried forward to the next meeting once.

*New Prices - due to increased costs, beginning with the February 2010 meeting
Attendees with reservations - \$40 Attendees without a reservation - \$45*

President's Message

By Denis Maurer, EA



As we approach the starting gate and the starter's gun is about to go off, take a deep breath. One of the easiest ways to relax our minds and bodies is by deep and slow breathing, clearing our minds for just a few moments can make all the difference. As we reach February, our Tax Season will begin in earnest. Some of our corporate clients will be getting us their information and have decided to file by March 15th and our individual clients have started receiving their tax documents. So it's back to work, long hours, more pressure and our ever changing tax laws and forms.

We must realize that as much pressure we have on our shoulders there will be a great number of clients who have not fared well over the past year. Many people may have lost their jobs and possibly their homes. Be sensitive to others feelings and to their state of mind. This not only includes your clients but also your family members and friends. As you know, our mood affects our loved ones and those around us. You will have to remind yourselves to take a break now and again. Get up from your desks and move around. Last year CSEA sent us little exercise reminders, if you did any of them, you realize they were helpful, so don't forget to do them again this year.

Every new tax season provides us with new problems, questions, and situations to solve. Many of you who attend either the Redwood City or San Francisco Team Meetings are able to ask these questions at your meetings and find help. For those of you who have been unable to attend, remember, one of the great benefits of belonging to the Golden Gate Chapter is that you have a great resource and a wonderful support group. Someone, actually many people, you can call on and rely on, to help you through your question or problem. Do not hesitate to take advantage of this great resource. It will make life a bit easier and definitely more fun. Reach out to your fellow Enrolled Agents, we are a community and one that understands what you are going through.

I wish you all a great season. We will meet again in February and March to commiserate on how things are progressing. I look forward to hearing your comments and feedback. But for now, let's just focus on what we have in front of us and don't forget to take a deep breath and relax.

Calendar of Events

Mark your Calendars

February 2010

- 4 Monthly Chapter Meeting 6:00 pm
Lynn Freer, EA - CA Update
12 Redwood City Team Meeting 8:00 am
19 San Francisco Team Meeting 8:00 am

March 2010

- 4 Monthly Chapter Meeting 6:00 pm
"Ask the Experts"
12 Redwood City Team Meeting 8:00 am
19 San Francisco Team Meeting 8:00 am

April. 2009

No Meeting

- 9 Redwood City Team Meeting 8:00 am
16 San Francisco Team Meeting 8:00 am

May 2010

- 6 Monthly Chapter Meeting 6:00 pm
14 Redwood City Team Meeting 8:30 am
21 San Francisco Team Meeting 8:00 am

June 2010

- 10 Annual Chapter Meeting 6:00 pm
14 Practitioners Representative Seminar Day 1
15 Practitioners Representative Seminar Day 2
18 Redwood City Team Meeting 8:30 am
18 San Francisco Team Meeting 8:00 am

July 2010

- 8 Monthly Chapter Meeting 6:00 pm
16 Redwood City Team Meeting 8:30 am
16 San Francisco Team Meeting 8:00 am

August 2010

- 5 Monthly Chapter Meeting 6:00 pm
13 Technology Seminar with Bob Jennings
20 Redwood City Team Meeting 8:30 am
20 San Francisco Team Meeting 8:00 am

September 2010

- 2 Monthly Chapter Meeting 6:00 pm

October 2010

- 7 Monthly Chapter Meeting 6:00 pm

November 2010

- 4 Monthly Chapter Meeting 6:00 pm
10, 11, 12 **CPE by the Bay Fall Seminar**

Newsletter Info?

Due: The 10th of each month

To: Amanda (Southward) Boston, EA

amanda@southwardtax.com

EMPLOYMENT EXCHANGE BANK

<http://goldengateea.blogspot.com>

Ads:

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Dalia Wood, CFP, EA

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Phone: 650-520-5601

Upcoming Golden Gate Seminars

- Monday, **June 14** and Tuesday, **June 15**, Practitioners Representative Seminar; two tracks (intermediate and advance) Watch your email for details.
- **August 13, 2010** Technology Seminar with Bob Jennings.
- Wednesday, Thursday and Friday, **November 10, 11, and 12, 2010** CPE by the BAY "Fall Seminar" Providing Quality speakers with their latest topics. Watch your email for details.

MEMBERSHIP CORNER

Don't you want to be where
"Everybody knows your name"?

Wearing a Golden Gate Chapter personalized name badge ensures everybody *does* know your name! Order one today by contacting: Diane Harding 650-325-9362 [or](#) just tell Members at the check in desk of our monthly dinner meeting.

If you hear of any Members under the weather, please contact **Jeanne Gerritsen, EA** 650-995-9903 or jgerritsen@jps.net so that the appropriate memento can be sent.



EA TEAMS:

Redwood City Group:

Will meet Friday, **February 12th** 2010 at **8:00 am**
At King & Associates: 820 American Street, San Carlos
Parking available in front of office.
Refreshments: **BL Pang, EA**
Call Amanda (Southward) Boston, EA for more info:
650 591-9661.
All Members welcome. No agenda. Get your tax questions answered. Network with other EAs.

San Francisco Group:

Will meet Friday, **February 19th, 2010** at **8:00 am** at
Boulevard Café, 2 Poncetta Drive, Daly City
Call Rico Delodovici, EA for more information: 650-755-3727
All Members welcome. No agenda. Get your tax questions answered. Network with other EAs.

Budget Request

The Finance & Budget committee requests that all Chapter committee chairs, chapter officers and directors requiring a budget for Fiscal Year 7/2010 to 6/2011 submit their request for budget to Pam Blair prior to **April 20, 2010**. A copy of the Budget Request form is available from Pam.

Please remember that even if you are not going to be serving on the committee next year that you currently chair, unless you budget now, the committee will not have a budget for next fiscal year.



Public Information & Awareness (PIA) for 2010

This year our Chapter's Public Information and Awareness Campaign has purchased Bart Station King Posters in the following Bart Stations; Embarcadero, Montgomery, Powell, Glen Park, Daly City, Castro, Forest Hill, and Millbrae. The public will see these posters as they are entering or leaving the stations. Our public relations outreach will be viewed by approximately five to six million people a month!



Board of Directors

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Committees

Administrative Review
Norman M. Golden, EA

Awards
Norman M. Golden, EA

Bylaws

Jeff Savitz, EA

Education

Fall Update. Seminar

Bob Kern, EA

1-Day Seminar

TBD

Monthly Program

Don Gundry, EA

Enrollment Exam

Norman M. Golden, EA

Don Gundry, EA

CPE Reporting

Lydia Mazer, EA

Education Marketing

Jeff Savitz, EA

Education R&D

Lydia Mazer, EA

Employment Bank

Dalia Wood, CFP, EA

Examination

Midge Schmidt, EA, CPA

Finance & Budget

Pam Blair, EA

Historical

Rico Delodovici, EA

Hospitality/ House & Site

Liz Stettiner, EA

Dennis Fullalove, EA

Member Benevolence

Jeanne Gerritsen, EA

Membership

Midge Schmidt, EA, CPA

Newsletter Editor

Amanda Boston, EA

Nominating

Jeff Savitz, EA

Public Disaster

Verna Wallace, EA

Public Information & Awareness

Denis Maurer, EA

Quickfinders

Dennis Fullalove, EA

Scholarship

Lydia Mazer, EA

Strategic Planning

Glenn Carlson, EA

Student Education Outreach

James Southward, EA

Tax Agency Liaison

Liz Stettiner, EA

Technology

Norman M. Golden, EA