



SOLANO-NAPA NEWS

CALIFORNIA SOCIETY OF ENROLLED AGENTS



"WE SPEAK TAX" - the Tax Professionals

Volume II, Number 5

July 2006

Alma Guenther, EA
**Solano-Napa Chapter of CSEA
Enrolled Agents EA of the Year 2005-2006**

Congratulations Alma on this well deserved recognition. Alma's contribution to our chapter has been significant and vital to its success. The following is a detailing of her commitment and an example of leadership:

During the past year she has served the chapter as vice president. Along with Matt Jones, she has helped to produce the chapter's outstanding newsletter. She worked with North Bay Chapter to co-host the IRS Town Hall meeting held in September.

She has served as part of the Napa Development Team, attending lunches, getting better acquainted (See Award, page 6)

President's Message

As a new fiscal year begins, last year's has gone out with a **bang!** Two awards issued: one for largest growth in membership for a small chapter and the other for Chapter of the Year! What an awesome year, lead by our first president, Anne Arms, EA. What lies in store for this coming year?

We have had our Planning Retreat and Board Orientation and are ready to hit the ground running. The planning retreat summary is enclosed in this issue of the newsletter. We now have a Policies and Procedures Manual to assist board and committee members in doing their duties. It is a road map to the future and a work in progress. Years from now when the current board and committee members have gone on, those who follow will have history and procedures to guide them. We will be a strong thriving chapter for years to come. Watch out CSEA and other Chapters, you haven't heard the last from the newest chapter of CSEA!

(See Prez Message, page 6)

Solano-Napa Chapter Breakfast & Dinner Programs

Solano-Napa EAs meet on the **second and fourth Tuesdays** of each month to share information with other EAs and tax professionals. The meetings are at Jack & Linda's Country Café, 2390 N Texas St., Fairfield, CA and as announced, at Jonesy's Famous Steak House, 2044 Airport Road, Napa, CA.

Breakfast Meetings – 8:00 am - 9:00 am:

On the second Tuesday, we have Breakfast Meetings where a predetermined topic will be discussed. All attendees are encouraged to participate by sharing their knowledge and experience. Cost is Dutch.

Dinner Meetings:

6:00 pm	Attitude adjustment
6:30 pm	Dinner
After dinner	Education

On the fourth Tuesday, we have Dinner Meetings where generally there will be a speaker on a topic for continuing education, practice management, legislative, or other issues pertinent to our profession. **Cost is \$30, Members and staff, \$35, non-members.** There is a \$5 discount if your reservations are made timely. Reservations and meal choice are due to Tereza Avalos, EA, fax (707) 678-1144 or email: tereza@tabertax.com by 5 pm on the third Tuesday of each month.

If you don't want to worry about timely reservations, this would be a perfect time to have your name added to the **Standing Reservation List.** (That way you only have to give notice when you are not going to be there!) See driving directions insert.

Napa Satellite Group Luncheons

Napa Satellite Group meets on the **third Thursday** of each month. These luncheons are at the Napa Elks Club, 2840 Soscol Ave., Napa. Meetings start at the noon hour.

Lunch Meeting – Noon – 1:00 pm

Invitation is open. **Cost is \$14.** For reservations, contact Chuck Gravett's office at (707) 258-1030 and RSVP with his secretary. Make checks payable to Linda Luchsinger.

Jerry Pusateri, EA is available for car pool from Fairfield.

2006 PLANNING RETREAT

In May, we had our annual planning retreat where we mapped out the direction the chapter will take in the next fiscal year. We looked at last years goals and discussed what we accomplished, what went well and what did not. It was a good meeting with the core group and some very welcomed newcomers. We want all members to be involved in the planning process. We are nothing with out the individual members that make up Solano-Napa.

We developed a new set of goals for fiscal year 2006-2007. These goals deal with Membership, Napa Satellite, Meeting Attendance, Speakers and Topics, a 3 year plan Back to Basics, providing California hours, a Website that is interactive and increase our communications. These goals fall into three major groups: Membership, Education and Communications.

Membership: We want to grow our chapter one member at a time. It will be a hard act to follow what was done in 2005-2006, but we have set ourselves a challenge to continue to increase our membership. One way will be to reach out to our Napa Satellite. To do this, we will budget and subsidize meetings in Napa, encourage our members in Solano County to attend Napa meetings, and obtain a list of members in Napa to include them in our email notifications.

Education: Our goals in this area are: Quality speakers and topics relevant to our practices and also to new members; Develop speakers in our Chapter; and increase Round Table discussions with topics; Create a schedule a year in advance of our meetings, seminars and topics, and our developing "Back to Basics" education program.

Communications: We need to set up a flow chart of our organization so members know who to contact for various information. Develop job descriptions so our board and committee members know what is expected of them. Our newsletter has been successful and will be maintained as a source of communication to not only our membership, but others as well. We must increase our verbal communications and make sure others know what happens at the board meetings. The board meetings need to be formalized and committee work done before rather than during the board meeting. We need to fully utilize the resources at CSEA. We do not need to reinvent the wheel and we can go outside our chapter for assistance, ideas and technology. And last of all, the board and committee members need to take ownership and responsibility for the tasks of managing the chapter's business.

Solano-Napa Chapter of the Year Award indicates that we are on the right track; however, it has also raised the bar for us. We need to get more people involved, develop new leaders, and assist our new members.

I welcome all members to become involved and help Solano-Napa achieve its goals.

CSEA'S NEWEST CHAPTER
SOLANO-NAPA CHAPTER

INTRODUCES THE 2nd ANNUAL

Solano-Napa Special Summer Mini Seminars

August 18, 2006, 9:00 am to 1:00 pm

RENTAL REAL ESTATE

From Acquisition to Sale & Everything In Between

Presenters:

Phil Correia, EA & Alma Guenther, EA

September 15, 2006, 9:00 am to 1:00 pm

THE INTEREST TRACING RULES WORKSHOP

Internal Revenue Service-Regulation 1.163-8T

Personal & Rental Residence Equity Borrowing Is On The Rise.
Learn the Potential Tax Pitfalls of These Transactions &
How to Allocate Interest to the Correct Expenditures.

Presented by Gerald Pusateri, EA

October 20, 2006, 9:00 am to 1:00 pm

SCHEDULE A: RENEW NOT REVIEW

Tips & Tricks for Working Smarter not Harder,
Appearing More Knowledgeable & Generating Increased Fees.

Presented By Gerald Pusateri, EA

Registration Fee: \$80 for One Seminar, \$140 for Two, \$199 for Three
Includes Continental Breakfast

All seminars at

Jack & Linda's Country Café, 2390 N Texas Street, Fairfield, CA 94533

Registration Form on Next Page

For more information contact: Anne Arms, 707-644-9016 or ArmsPnA@aol.com

SOLANO-NAPA CHAPTER

PRESENTS
2nd Annual
**SPECIAL SUMMER
MINI SEMINARS**

9:00 am to 1:00 pm

Jack & Linda's Country Cafe
2390 N Texas Street
Fairfield, CA 94533
(707) 425-1442

**Continental Breakfast
Included**

Deadline: Friday prior to event

Special price for all three sessions!

1 Session **\$80**

2 Sessions **\$140**

3 Sessions **\$199**

**After deadline
price will be \$85 per session**

**Special Pricing Deadline is
August 11, 2006**

Registration Form

Name: _____

Address: _____

Tel: _____

Fax: _____

Email: _____

Circle number of sessions

1	2	3
\$80	\$140	\$199

Circle session(s) of choice

A B C

Credit Card: MC Visa Am Express

Card #: _____

Exp. Date: _____

Signature: _____

Mail or fax form to:

Alma Guenther, EA
Fax: (707) 643-2222
715 Tennessee Street
Vallejo, CA 94590

Questions:

Contact Anne Arms, EA
Ph: (707) 644-9016
Email: ArmsPnA@aol.com
Alma Guenther, EA
Ph: (707) 643-2226
Email: almaea@pacbell.net

BRASS TAX GROUP PROGRAM**Education for you and *\$\$\$CASH\$\$\$* for our Chapter!**

This program provides an opportunity for the Chapter to raise funds while its members obtain quality CPE credits presented by renowned instructors, David Gorsich, **EA** and Michael Karll, **EA** of Brass Tax PresentationsTM. Here's how it works. We get 10 or more members to register for either of the presentations, Brass Tax will give back to the Chapter \$25 for each registered member. Wow, that's a great way for us to get some cash into the treasury and get quality education at the same time!! What's even better, we do not have to register for or attend at the same location. We just need 10 or more to commit to register. The following details the official rules to qualify:

Our Chapter will charge \$150 per attendee, the regular early bird registration fee. The Chapter would then send to Brass Tax only \$125 per attendee and keep \$25 per attendee as a referral fee.

Again, we must have 10 or more registered attendees. All attendees must be listed on one roster with name, address, phone number and certificate or registration number and location; however, all do not have to attend at the same location.

Lastly, the Chapter will make payment on 1 check for the full amount due Brass Tax and that payment must be received by August 21, 2006 for the September Toolbox Program or November 6, 2006 for the November/December Update Program. Registrations received after those dates will be charged the full fee.

You can find the dates and locations at the following link, [Brass Tax--Education for the Tax Professional](#).

If you have attended presentations given by David and Michael before, then you know the show; however, if you have not, then you will be in for a real treat while obtain quality CPE. So, let's all get together and go. What a deal. Eight (8), or sixteen (16) hours of quality CPE at an affordable price made even for affordable because we get to keep some for our Chapter. Let's Go!!

(Prez Message)

What are our goals for the coming year? Grow the Napa Satellite and have CPE at those lunch meetings. We plan to address non-member EA's and California licensed preparers to the benefits of membership. Reach out to the local college accounting and tax classes regarding EA as a career path and inform them of CSEA's scholarship program. Expand our educational offerings with more mini seminars, workshops and "Back to Basics" topics. We have to remember that advance education is not the only type of education. New members need to be nurtured and helped along to achieve their potential and grow themselves and their practices.

We will grow our Chapter and assist in our members' personal and professional growth one member at a time. Join me, Officers, and Directors of the Board in helping us achieve our goals. Here's to another Great Year!

Alma V Guenther, EA
President Solano-Napa Chapter CSEA

(Award)

with the Napa professionals, and helping to promote Solano-Napa Chapter. She volunteered to team teach one of the chapters summer seminars. In December, during Legislator Month, she visited the offices of State Senator, Wes Chesbro and State Representative, Noreen Evans. She was a VITA volunteer, taking their training and teaching a class.

She represented Solano-Napa Chapter as CSEA director this past year. She served as chair of the CSEA Nominating Committee. Members of the committee are elected from the CSEA directors, by the CSEA directors. The committee then elects its chair. She also served on the Finance & Budget Committee, the Audit Committee, and Professional Education Production Committee (PEPCO). She has been appointed to serve as CSEA Audit chair for the coming year. When something needs doing Alma is there to see that it is done. She sets the example of the dedicated, resourceful, and knowledgeable member.

Again, congratulations Alma!

New Officers and Board of Directors

At our June 27 Dinner Meeting, new Officers and Board of Directors were elected and installed. There were awards of appreciation for service given by outgoing Officers and Board members. Again, we say thank you for your service.

For the newly elected Officers and Board, we say congratulations and thank you for stepping up to accept the challenges of managing the chapters' affairs. Thank you for your commitment and dedication. See our Officers and Directors listing later in this publication.

From the IRS, e-News dated 6/19/2006

1. IRS Enlists Tax Practitioners to Make Tax Compliance Easier and to Reduce the Tax Gap

IRS Office of Taxpayer Burden Reduction Wants Your Ideas to Make Complying with Tax Laws Easier In [IR-2006-93](#), the IRS' Office of Taxpayer Burden Reduction (TBR) encourages tax professionals, business owners and others to submit proposals on ways to reduce taxpayer burden by using referral [Form 13285A](#), [Reducing Tax Burden on America's Taxpayers](#). More information on [completing the form](#) is available on the IRS Web site.

[IRS Partner Headliners 169 - Stakeholder Ideas Needed To Address the Tax Gap](#)

Earlier this year, the IRS announced in [IR-2006-28](#) an estimate of the tax gap for tax year 2001. The overall gross tax gap – the difference between what taxpayers should have paid and what they actually paid on a timely basis – came to \$345 billion. IRS enforcement activities, coupled with other late payments, recover about \$55 billion of the tax gap, leaving a net tax gap of \$290 billion for 2001.

A number of critical actions and proposals have been initiated to reduce the tax gap, but more is needed. We value your feedback and suggestions. If you have an innovative recommendation on how the IRS can further impact the tax gap while imposing little burden on taxpayers, please share your idea with your [Stakeholder Liaison local contact](#).

Solano-Napa Officers and Directors

President	Alma Guenther, EA 707 643-2226 almaea@pacbell.net	Directors	Phil Correia, EA 707 426-0920 pcorreia@sbcglobal.net
1st Vice President	Ken Spingola, EA 707 553-2645 kspingola@sbcglobal.net		Matt Jones, EA 707 557-6868 mattstax@sbcglobal.net
Secretary	Louanna Grindle, EA 707 451-7611 taxhouse@sbcglobal.net		Mike Klobas, EA 707 449-8146 mklobas@pacbell.net
Treasurer	Chris Raycraft, EA 707 428-4741 craycraftea@sbcglobal.net		Lea Garrity, EA 707 386-3390 leagarrity@charter.net
CSEA Director	Gerald Pusateri, EA 707 426-4396 untaxit@pacbell.net		Donald Wulf, EA 707 252-0442 dwulf@calltpac.net
Immediate Past President	Anne Arms, EA 707 644-9016 armspna@aol.com		Sherri Scarrott, EA 707 426-9472 eataxldy@pacbell.net

Chapter Committee Chairs

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Phil Correia, EA
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SEMINAR/SITE

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RESERVATIONS

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Preservation of Practice due to Medical Emergency

Mike Klobas, EA or Death (PPMED)
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hEArD It Through The Grapevine

The Solano-Napa Chapter of California
Society of Enrolled Agents....**Rocks!**....
is **The Bomb!**....is.....

The Chapter of the Year!
Yeah, Baby!

(I just could not help it! - Editor's privilege.)

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Solano-Napa Chapter CSEA

c/o Matt Jones, EA

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Vallejo, CA 94591-5610

First Class Mail

Return Service Requested



2006 CALENDAR OF EVENTS

JUL

- 05 CSEA Audio Tax Session 11 am – 12 pm
“Introduction to IRS e-Services”, Neki Jones,
Tax Specialist, IRS. See CSEA website for
more.
- 11 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Topic: TBA
Jack & Linda’s Country Café, Fairfield
- 20 Napa Satellite Group, Lunch Meeting, Napa
Elks Club, 2840 Soscol Ave, Napa
- 25 Solano-Napa Board Meeting, 2:00 pm
Jack & Linda’s Country Café, Fairfield
- 25 Solano-Napa Dinner (4th Tue.) 6:00 pm
Topic: IRS Collections: Alternatives &
Resolutions
Philip Fiegler, EA
Jack & Linda’s Country Café, Fairfield

AUG

- 02 CSEA Audio Tax Session 11 am – 12 pm “FTB
e-Services”, Sean McDaniel, FTB e-Services
Program
See CSEA website for more.
- 08 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Topic: TBA
Jack & Linda’s Country Café, Fairfield
- 17 Napa Satellite Group, Lunch Meeting, Napa

Elks Club, 2840 Soscol Ave, Napa

- 18 **Solano-Napa Special Summer Mini Seminar**
Topic: Rental Real Estate, 9:00 am – 1:00 pm
Jack & Linda’s Country Café, Fairfield
- 22 Solano-Napa Board Meeting, 4:00 pm
Napa Location TBA
- 22 Solano-Napa Dinner (4th Tue.) 6:00 pm
Topic: Tax Panel
Napa Location TBA

SEP

- 12 Solano-Napa Breakfast (2nd Tue.) 8:00 am
Topic: TBA
- 14 Napa Satellite Group, Lunch Meeting, Napa Elks
Club, 2840 Soscol Ave, Napa
- 15 **Solano-Napa Special Summer Mini Seminar**
Topic: The Interest Tracing Rules Workshop,
9:00am – 1:00 pm
Jack & Linda’s Country Café, Fairfield
- 21 IRS Town Hall Meeting, 8:30 am – 4:30 pm
Stockton
- 22 CSEA CA Liaison Meeting, Lion’s Gate Resort
Sacramento
- 23-24 CSEA Board Meeting, Lion’s Gate Resort
Sacramento
- 26 Solano-Napa Dinner (4th Tue.) 6:00 pm Topic:
TBA
Jack & Linda’s Country Café, Fairfield