



The Bulletin

East Bay Association of Enrolled Agents

*A Chapter of the California Society of Enrolled Agents
Affiliated with the National Association of Enrolled Agents*

March / April 2018

NEXT MEETING: Wed., Mar. 21, 2018

Place: **Dublin Holiday Inn**

6680 Regional St., Dublin, CA 94568

(go to <http://www.holidayinn.com/hotels/us/en/dublin/dubrm/hoteldetail#Directions>) **or take BART!**

4:30 Board Meeting

6:30 Dinner Buffet

7:00 Program: **"Federal Tax Panel"**

Cost: \$40.00 with reservation by Monday, Mar. 19
\$50.00 with reservation after deadline

Sign up online at:

<https://www.123signup.com/calendar?Org=ebaea>

(Please print out your confirmation to ensure that you clicked all the right buttons to register). Questions: email ebaean@ebaean.org (preferred) or call 800-617-1040.

March Session: Federal Tax Panel

Speakers:

Joe Calderaro, EA, Karen Brosi, EA,
and Sharon Kreider, CPA, EA

This month, we have our annual panel discussion on Federal tax issues. Our speakers are among the most knowledgeable and enjoyable you'll hear, with extensive experience and insight into Federal tax law. The session will be 2 hours.

Submit your most challenging questions! The panelists will first answer and discuss questions submitted in advance by attendees. Maximize your free research by getting your Federal questions to Mike Power early. If time allows, questions submitted at the dinner will be addressed, but questions that were submitted in advance by email will be considered first.

Please send your panel questions to our scribe, Michael Power, CFP, EA at mpower@powerinvesting.net.

Our meetings are on Wednesday, and the panel members will research your question for you! But we must be courteous and give them as much lead time as possible. (Friday or Sat prior to the Wed meeting is best.) Mike will accept all questions right up to about 2 hours before the meeting. You can also submit at the meeting, but time limits might mean your Q is not A'd. The Questions and Answers are usually blasted out to attendees within a week of the meeting. If you have a pressing need for a faster write up, email Mike directly as he has usually composed the Q&A by Friday. Thanks again, Mike, for handling the question submission and transcript production.

Our panelists: **Joseph Calderaro, EA**, has over 40 years of experience providing technical and procedural assistance to personnel in the examination, collection and taxpayer service and quality review functions with the IRS. He now provides technical support to CSEA Members in answering tax related questions.

Karen Brosi, EA, is well known to EBAAEA members from presentations to the Chapter and various seminars. She has been practicing in Palo Alto as an Enrolled Agent and CFP for over 20 years. She was a senior tax specialist and director of financial planning at a respected Palo Alto CPA firm, prior to forming her own practice.

Karen is a past President of the Golden Gate Chapter, and past officer of CSEA. She speaks often at CSEA Super Seminars, and for Western CPE, and writes for major tax publications.

Sharon Kreider, CPA, EA, has been practicing in Silicon Valley for over 25 years. Prior to establishing her own firm, Sharon worked for the IRS.

Sharon Kreider has been providing tax update classes to more than 15,000 California CPAs, EAs and other tax professionals for more than 20 years. She is a highly regarded professional speaker and a trusted instructor.

Sharon is a popular presenter at the CSEA Super Seminars and at the AICPA Tax Planning Conference for High Income Individuals.

Sharon is a regular contributor to Western CPE's Tax Tips and e-Tax alerts and has been quoted as a tax authority in the Wall Street Journal, Money Magazine, Forbes, The New York Times and a variety of local radio, television and print outlets.

Sharon was named as one of the Top 50 IRS Tax Practitioners by NPA Magazine and was named as one of the Top 40 Tax Advisers to Know in Recession by CPA Magazine.

PRESIDENT'S MESSAGE

by Sharon Hinchman, EA, NTPI Fellow

I am a week late in writing this article. Sorry, I've been a little busy. This feels more like April than March. Oh well, it comes with the job.

A few things of which I want to remind you is our upcoming IRS panel who will answer all your pressing questions. If it is anything like last month's State panel, be prepared to be glued to your seat for two hours of non-stop answers. I always look forward to these meetings to see what other preparers are dealing with and how it is different from what I have. There is always a surprise hiding in there for me.

Our next meeting after March will be in May and will be a double header for those of you who sit through both the mini seminar on stock options and the meeting. Our stock option Mini seminar was requested by a number of you. Our speaker, Santos Solano, CPA will present a total pen to paper explanation from grant to sale and everything in between. I'm looking forward to it!

May will also be our election month. Right now the nominating committee is looking for a few good people to step up for both board positions and officers. In order for a group succeed, there needs to be a strong core of individuals ready to take the helm. I have found the input from my board to be invaluable. Many of the new ideas we have implemented came from a board member, and then another board member added to it, and finally, it became a plan. Many hands make light work. If each of us takes on a little bit, no one will feel overwhelmed. If you are not up to a board position, there are several other positions the need either a principle or a back up person. Please talk to me or another board member if you can help out in any way.

**Everyone is Irish
on St. Patty's Day!**



The Nominating Committee is in the process of contacting people to see if they would be interested in serving on the Board for the 2018-2019 year. Please contact President Sharon Hinchman, EA or 1ST VP Gail Stan, EA if you have questions or would like to volunteer for a position. We need volunteers for the following positions:

- **1st Vice President** – is also the designated CSEA Director.
- **2nd Vice President** – Patty Pringle, EA stepped up to fill this position temporarily but as a two-time Past President, she really does not want to continue up the chairs again. So, we need someone to volunteer to be 2nd VP with the intention of moving up to 1st VP and then President.
- **Treasurer** – Carolyn Krieg, EA has served for 3 years and according to our Bylaws, that is as long as she can serve.
- **Directors**

The Nominations will be announced in the May Bulletin and the voting for new officers will be at the May Annual Meeting. Nominations will also be accepted from the floor.

Did you Know?

by Gail Stan, EA

At last month's CA Tax Panel, FTB Taxpayer Advocate Susan Maples told us about a new feature on the FTB website – Time Frames which tell you how long the wait time is. There are 3 tabs – Returns/Refunds, Payments and Contact.

In the Contact category you can find the wait times for the following services:

- Customer Service Line (800) 852-5711)
- Tax Practitioner Hotline
- MyFTB Secure Chat
- General Chat
- MyFTB Secure Message
- Mail or Fax
- 24/7 Automated Support (800) 338-0505

https://www.ftb.ca.gov/aboutFTB/Timeframes/?WT.mc_id=Featured_Processing_Times#/contact



Mini Seminar – Stock Options

Reserve Wednesday, May 16 for a special mini seminar on Everything you wanted to know about Stock Options. This will include a pen to paper explanation from grant to sale and everything in between.

This 4 hour mini seminar will be held at the Dublin Holiday Inn during the afternoon before our regularly scheduled dinner meeting.

Our guest presenter will be Santos Solano, CPA, Tax Manager at Sensiba San Filippo, LLP; who has technical expertise working with high net worth individuals and closely held businesses. His industry specialties include manufacturing, constructions, technology, and real estate. He graduated from Santa Clara University and has been serving in public practice since 2004. In his free time, he enjoys hiking, and training his Lab.

About Sensiba San Filippo - with 40 years of experience, Sensiba San Filippo LLP (SSF) ranks among the region's top 20 public accounting firms. Offering comprehensive assurance, tax and consulting services, the Firm has a regional focus with global expertise. As a member of Morison KSI, SSF is a part of an international association of affiliated accounting firms that supports their clients' global business needs in over 88 countries. Headquartered in Pleasanton, the Firm has offices in San Mateo, San Jose, Morgan Hill, Fresno and San Francisco. For more information, visit www.ssflp.com.

Watch for more information in the May Bulletin and a special communication from EBAEA with all the details.

March 2018

- 21 **EBAEA Dinner - Dublin Holiday Inn**
Topic – Federal Tax Panel with Joe Calderaro, EA, Karen Brosi, EA, Sharon Kreider, EA, CPA

April 2018

No Meeting – Everyone is too Busy!

May 2018

- 16 **Mini Seminar – Dublin Holiday Inn**
Topic – Employee Stock Options by Santos Solano, CPA
This will be 4 hours of CE before the dinner meeting
- 16 **EBAEA Dinner - Dublin Holiday Inn**
Election of Officers

June 2018

- 20 **EBAEA Dinner - Dublin Holiday Inn**
- 24-26 **CSEA Annual Meeting & Board Meeting – Reno, NV**
- 27-29 **CSEA Super Seminar – Reno, NV**

November 2018

- 7-9 **EBAEA Tax Talk Seminar – Dublin Holiday Inn**



Where else but Dublin would you want to celebrate St. Patrick's Day? Come out for a free, memorable and authentic Irish experience on Saturday, March 17, 2018. The **parade** gets going at 9:30 am at Amador Plaza, and the **St Patrick's Day Festival** will be held from 10 am to 5 pm at the Dublin Civic Center.



BULLETIN ADVERTISING POLICY

by Gail Stan, EA, Bulletin Editor

To encourage more Members to use the Bulletin to fill their needs, we present the Bulletin advertising policy:

1) All Bulletin notices are run for one issue. If you wish to run a notice for a longer period, you must resubmit the notice for each issue. *(There will be no April issue of the Bulletin; we will resume publication for May 2018.)*

2) Maximum notice size is 1.5 column inches. This equals a space one and one-half inches high by one column (3.5 inches) wide. The standard Bulletin font is Times New Roman 11 point.

3) The Bulletin Editor reserves the right to edit any notice for style, content and length.

4) All notices must be submitted (and payment received) by the 25th of the month prior to initial publication. Send desired text to: EBAEA.Editor@gmail.com.

5) Member EA notices seeking or offering employment, clients or EA-practice-related matters are run at no charge as a Member benefit. This includes an ad run by a firm which employs a Member. Member notices offering other services or products, and all non-Member notices are run at the standard fee of \$50 per issue insertion. *(Professional Associates and Students are considered non-Members for advertising purposes.)*

The Bulletin Editor reserves the right to modify or reject any notice which, in the sole opinion of the Editor, violates any of the principles of EBAEA.

“The art of taxation consists in so plucking the goose as to obtain the largest possible amount of feathers, with the smallest possible amount of hissing.”

Jean-Baptiste Colbert

“The Taxpayer’s prayer: Oh Mighty Internal Revenue Service, who turneth the labor of man to ashes, we thank thee for the multitude of thy forms which thou hast set before us and for the infinite confusion of thy commandments, which mulitplyth the fortunes of lawyer and accountant alike.”

Russell Baker

Small Group Tax Meetings

Antioch /Brentwood Fridays 8:00am
Brentwood Café, 8500 Brentwood Blvd, Brentwood
Ken Seamann EA (925) 634-8297

Danville Area 4th Tue 9:30am
Pascals French Oven, 155 Railroad Ave, Danville
Michael Power EA (510) 366-8836

Oakland Area (Near BART) 4th Tue 9:00am
Buttercup Café, 229 Broadway, Oakland
Andy Rogers EA (510) 332-0401

Livermore Area Fridays 8:45am
Shari’s Restaurant, 1116 East Stanley Blvd, Livermore
Jerrilynn Krebs EA (925) 606-8181

Castro Valley 3rd Tue 8:30am
Dino’s Restaurant, 20390 Lake Chabot Rd, Castro Vly
Dagmar Bedard EA (510) 537-3883

Email-only Group as needed
Send an email to halloftaxes@gmail.com
Peggy Hall EA (925) 388-1040



2017 - 2018 Board of Directors and Committee Chairs

President:

Sharon Hinchman, EA sharon@alamo-tax.com

1st VP: Gail Stan, EA gail@gailstantaxes.com

2nd VP:

Patty Pringle, EA patty@eastbaytaxmatters.com

Treasurer: Carolyn Krieg, EA ckrieg111@msn.com

Secretary: Katherine Judd, EA kjuddea@gmail.com

Immediate Past President:

Aida Torres, EA aida@aidatorres.com

Director 2017 – 2019 (2 year):

Peggy Hall, EA halloftaxes@gmail.com

Dan Leonard, EA dan@marathonrp.com

Cheryl Meder, EA cmeder5@gmail.com

Lourdes Rabara, EA lrabara@aol.com

Director 2017 – 2018 (1 year):

Mary M. Geong, CPA, EA mmgeong@aol.com

Ralph Nelson, EA taxhelp@financial-harmony.com

CSEA Director:

Gail Stan, EA gail@gailstantaxes.com

Communication Committee

Chair: Gail Stan, EA gail@gailstantaxes.com

Bulletin: Gail Stan, EA, EBAEA.Editor@gmail.com

Disaster Services:

Jan Bridges, EA jan_bridges@comcast.net

IRS Practitioner Panel:

Phil Fiegler, EA pf@philtax.com

Legislative: Linda Fox, EA fox4tax@aol.com

Membership: Aida Torres, EA aida@aidatorres.com

Membership Ambassador:

Joanne Anderson, EA jander3812@aol.com

PIA: Patty Pringle, EA patty@eastbaytaxmatters.com

Practice Preservation:

Linda Fox, EA fox4tax@aol.com

Quickfinders:

Clare Flores, EA clare@taxandpayroll.com

Website:

Patty Pringle, EA patty@eastbaytaxmatters.com

Education Committee

Chair: Sharon Hinchman, EA sharon@alamo-tax.com

Continuing Education:

Katherine Judd, EA kjuddea@gmail.com

Education Coordinator:

Marjorie Williams-Jones, EA Marj@MarjTax.com

Mini Seminar Team:

Patty Pringle, EA patty@eastbaytaxmatters.com

Program: Peggy Hall, EA halloftaxes@gmail.com

SEE Class: vacant

Tax Talk:

Patty Pringle, EA patty@eastbaytaxmatters.com

Town Hall:

Patty Pringle, EA patty@eastbaytaxmatters.com

Administration Committee

Chair: vacant

Bylaws/SOP: Gail Stan, EA gail@gailstantaxes.com

Audio/Visual Technical Advisor

Dagmar Bedard tax@dagmarbedard.com

Chapter Office Administrator

Patty Pringle, EA patty@eastbaytaxmatters.com

Chapter Office Liaison:

Dagmar Bedard, EA tax@dagmarbedard.com

Financial Review:

Gail Stan, EA gail@gailstantaxes.com

Nominating:

Aida Torres, EA aida@aidatorres.com

Volunteer Coordinator:

Sharon Hinchman, EA sharon@alamo-tax.com



EAST BAY ASSOCIATION OF ENROLLED AGENTS

6400 Village Parkway, Suite 201, Dublin CA 94568-3006

(800) 617-1040 or (925) 320-7802 fax (925) 553-3515 email: ebaea@ebaea.org

Bulletin editor: EBAEA.Editor@gmail.com. (Gail Stan, EA)

Web Page <http://www.ebaea.org>

The East Bay Association of Enrolled Agents (EBAEA) meets monthly except for the month of April. Meetings are usually held at the Dublin Holiday Inn although occasionally, we will meet somewhere else with plenty of notice to our members of the change in location for a particular month.

Dublin Holiday Inn

6680 Regional St.
Dublin, CA 94568

In Memoria



Charles "Chuck" Arnold Putney
Resident of Walnut Creek, CA

Chuck was born in Kalispell, Montana September 23, 1933 to Ruth Klose Putney and Lawrence Bates Putney. In 1942 the family moved to Seattle, and in 1949 they moved to Vashon Island to a small acreage on Quartermaster Harbor, where Chuck was a junior in High School. Due to Chuck's innate engineering abilities, he and his two younger brothers built several boats.

In 1955, Chuck graduated from the University of Washington in Mechanical and Industrial Engineering. After college, Chuck served four years in the U.S. Air Force, leaving as a Captain. He first served in Korea and was then stationed in Rome, New York where he met his first wife, Madeline. They moved to Oakland, California where Chuck worked for Varian Instruments. Varian sent them to Scotland to set up a manufacturing facility.

His desire to work and serve in his community led him to start his own firm in 1970, Putney Klein Associates. **In 1972, Chuck successfully completed the Enrolled Agent Exam, licensing him to represent clients before the Internal Revenue Service.** In 1982, Chuck entered the financial planning world, becoming a CERTIFIED FINANCIAL PLANNER professional in 1983.

Chuck was an active member of several professional organizations, both locally and statewide. He also worked with a number of non-profit organizations. His experience with humanitarian social objectives made him an outstanding leader in his community. He served as Deacon of his church and on his church's foundation board. Chuck was a past president of the Diablo Valley Lions Club and **past president of the East Bay Chapter of Enrolled Agents.**

After his first wife Madeline passed away, Chuck met and married Elaine Norton in 2004. Chuck was grateful to now be a part of a loving family with kids, grandkids, and great grandkids, who opened their hearts to him. With the last 14 "Golden" years, Chuck had a good and fulfilling life and brought comfort and trust to the many he touched.

Chuck quietly and bravely battled Prostrate Cancer, but his body finally surrendered and he passed away Tuesday evening, February 27. In the presence of his precious, beloved wife Elaine and his immediate family, he peacefully went into the presence of Jesus.

Chuck is survived by his wife, Elaine, his two brothers, Dennis and Jenny Putney and Fred and Mary Lynn Putney as well as Elaine's son, Scot and Jackie Norton, and her daughter Janine Frisk. He is also survived by his nephew Stewart and Carolyn Putney and niece Justine and Jonathan Mackler, as well as his niece Kristina and Larry Sparks and nephew David Putney. Grandchildren; Russel and Andrea Frisk, Bradley and Christy Frisk and Jeffrey Frisk as well as Stacie D'Orazi, Hannah and Pete Landani and 9 great grandchildren.

Memorial Service March 18th, 2018 at Walnut Creek Presbyterian Church, at 2 PM.

In Lieu of flowers, donations in Chuck's memory may be made to Diablo Valley Lions Club, P.O. Box 5588, Walnut Creek, CA. 94598

EBAEA Member Profile
Return to EBAEA.Editor@gmail.com

Name:

Year you became an EA:

NTPI Fellow:

Location of your practice (city):

Number of Employees in your practice:

Education:

Tax Specialization(s):

How/Why did you become an EA?

What do you like best about being an EA?

What do you like least about being an EA?

Have you previously been an officer of EBAEA? What position(s) and year(s)?

Have you been an officer of CSEA and/or NAEA? What position(s) and year(s)?

Anything else you would like the members of EBAEA to know about you?
