

The CSEA North Bay Chapter
Presents the 21st Annual



*Wine
Country
Tax
Seminar*

Monday & Tuesday

November 9 & 10, 2009

Petaluma Community Center

320 North McDowell Boulevard

Petaluma, CA 94954

*OUTSTANDING SPEAKERS ON TIMELY &
PRACTICAL TOPICS*

16 HOURS OF CPE PLUS 2 HOURS ETHICS

ALL COURSE OUTLINES & MATERIALS

EXCELLENT NETWORKING OPPORTUNITIES

*EXHIBITORS DEMONSTRATING THE LATEST & THE
BEST PRODUCTS FOR THE TAX PROFESSIONAL*

*BREAKFASTS, LUNCHES & REFRESHMENTS
DURING BREAKS*

*SPECIAL HOTEL ROOM RATE
BEST WESTERN PETALUMA INN*

*OUR TRADITIONAL FABULOUS DOOR PRIZES
ALL THIS FOR LESS THAN \$20 PER CPE HOUR
(FOR MEMBERS WITH BONUS ETHICS)*

ALSO:

*DISCOUNTED REGISTRATION FOR
LAST CHANCE UPDATE BY
TOM DALEY, CPA AND GARY MCBRIDE, CPA
JANUARY 18, 2010*

2009 – SEMINAR SCHEDULE

7:30 a.m. Registration, Exhibitor Rooms and Continental Breakfast Buffet open
Lunch is provided both days as well as refreshments at breaks



Monday, November 9 – 8:10 a.m.

S Corporation Basis Issues – Vicki Mulak, EA, CFP®

This intermediate/advanced level class will serve as a serious guide for the preparation of the 1120S as well as the corresponding 1040 returns for the shareholders with an emphasis on basis issues, AAA accounts and shareholder loan accounts. Sometimes viewed as a “flawed” form, the 1120S K-1 has an inherent deficiency. Since it only provides current year basis adjustments, the 1040 preparer is left to the almost impossible task of determining the taxability of distributions and loan repayments as well as applying the three levels of loss limitation, because, as Vicki points out, the K-1 is **NOT** a W-2! (4 CPE hrs.)

FOIA Requests & Transcripts – Nadine Smith, EA

When and how should you make a request for disclosure utilizing the Freedom of Information Act? Why are transcripts a vital tool when representing a taxpayer? (2 CPE hrs.)

Liens & Levies – Nadine Smith, EA

Learn the when and how to get a federal tax lien discharged or subordinated. Find out what restrictions apply to different types of levies and how to handle both liens and levies with ACS, with a Revenue Officer, and at Appeals. (2 CPE hrs.)

Tuesday, November 10 – 8:10 a.m.

Top Ten Individual Tax Planning Ideas – Noelle Allen, CPA

Delve into the major individual tax planning and compliance issues that will allow you to help your individual clients maximize their tax savings and leverage their overall financial positions. Noelle presents a modified version of her popular 8-hour presentation that she makes to CPAs through the CalCPA Education Foundation. This intermediate level seminar provides insight into how personal financial planning issues affect tax planning. (6 CPE hrs.)

Legal Issues for Tax Practitioners – Robert Pollak, JD

Are you able to recognize the warning signs of financial elder abuse? What are your responsibilities to your client who may be a victim of predatory caregivers or family members? Rob delivers an insightful look at many of the legal issues that practitioners encounter on the front line in dealings with clients, trustees, and estate representatives. He'll also provide an update on estate tax planning in the context of anticipated changes in the law. (2 CPE hrs.)

Check our website at NorthBayEA.org for further details & updates

ETHICS JEOPARDY

Monday Evening 5:20 p.m. – 7:00 p.m.

Special Ethics education session!

Who says Ethics can't be fun? Kevin Huston, EA brings this very popular program to us for our bonus session. Stay for this jeopardy-type game show



format presentation of Circular 230 issues, recent changes in preparer penalties, substantial authority, and California Dept. of Justice cases sanctioning preparers. Attendees will compete in two or three teams to test and reinforce their knowledge of this important topic. (2 CPE hrs.)

REGISTER ONLINE AT NorthBayEA.org CREDIT CARD PAYMENT IS PREFERRED

****ONLY USE THIS FORM IF PAYING BY CHECK****

Name:				Mail to: Pauline Baldenegro, EA 1120 College Ave. Santa Rosa, CA 95404			
Firm Name:					Fax: 707-578-3588		
Address:							
City:							
State:		Zip		<input type="checkbox"/> Vintage 2009 Seminar:	\$		
Phone:				<input type="checkbox"/> One Day Vintage 2009 Seminar:	\$		
Fax:				Indicate Day _____			
Email address:				<input type="checkbox"/> Ethics – 2 Hour Session	\$		
Enrollment/License #: _____				Total Payment		\$	
<input type="checkbox"/> EA <input type="checkbox"/> CPA <input type="checkbox"/> CTEC <input type="checkbox"/> Other				<input type="checkbox"/> Check Enclosed payable to: North Bay Chapter CSEA			
<input type="checkbox"/> Check here and describe any special accommodations you need to fully participate: _____				CSEA Member of _____ Chapter			
				Emergency Contact Name: _____			
				Emergency Contact Phone #: _____			

21ST ANNUAL WINE COUNTRY TAX SEMINAR SPEAKERS

Noelle Allen, CPA, is a partner with her son in Allen & Allen, LLP, a CPA Firm in Cameron Park, CA. She is a nationally recognized tax professional with 35 plus years experience working in the industry. She is currently a member of the California CPA Society and a member and past chairperson of the California CPA Society Committee on Tax. She's also a past member of the Tax Practice and Procedure Committee of the AICPA. In addition to her practice, Noelle has been a professional lecturer for the past 25 years and is a well-known radio and television personality. She has published articles on current tax topics for *The Tax Adviser* and other periodicals as well as a humorous book entitled *Confessions of a Tax Accountant*.

Kevin Huston, EA, ChFC, CLU, has been preparing taxes for 21 years. Through his firm, Blue Ridge Tax Advisors, Inc. in Arden, NC, he also offers retirement and education planning, elder care planning, investment management and insurance services to his clients. As a Certified Senior Advisor (CSA), he has been trained to help Seniors in their unique needs. Kevin teaches classes for other tax professionals through various state and national tax organizations. Next year he will be a presenter at the CSEA 2010 Super Seminar.

Vicki Mulak, EA, CFP®, an Enrolled Agent and a Certified Financial Planner and also insurance and securities licensed. As owner of American Financial and Tax, in Tustin, CA, Vicki has assisted both business owners and individuals for 23 years in a variety of tax and

financial matters. She has represented the tax practitioner community for over 12 years on California EDD's Small Business Employer's Advisory Committee. She regularly speaks on California tax law and other tax related business topics to groups of tax professionals. In 2006, she was the recipient of CSEA's prestigious Thomas P. Hess Award in recognition of her contributions to the fulfillment of the Educational Goals of CSEA. Vicki is also active with Practitioner Publishing Company, serving as an editor for the *Accounting Quickfinder* book.

Robert Pollak, JD, received his BA from University of Southern California where he was named Phi Beta Kappa and his JD degree from Loyola Law School where he was a member of the Law Review. He is a well-known speaker whose lectures have provided continuing education for lawyers, tax professionals, Registered Investment Advisers and insurance professionals. Rob is a partner in the law firm of Pollak & Cusack and has practiced trust administration and probate since 1989.

Nadine Smith, EA, became an Enrolled Agent in 1996. She is the owner of Specialized Tax Assistance in Fort Lauderdale, FL and focuses her practice on representing taxpayers in tax controversies. She currently is the Chair of the Planning Committee for the National Tax Practice Institute (NTPI) as well as an instructor in Level II. She is the immediate Past President of the Michigan Society of Enrolled Agents and a member of the IRS Practitioner Liaison Committee.

ACCOMMODATIONS

Best Western Petaluma Inn

200 S. McDowell Blvd.
Petaluma, CA 94954
Phone (707) 763-0994 or (800) 297-3846

A full-service Petaluma hotel with well-appointed guest rooms equipped with cable satellite television HBO® and high-speed Internet access. Other amenities include free parking, continental breakfast and an onsite restaurant. Located conveniently from Highway 101 off the East Washington exit in central Petaluma.

Special Room Rate*: \$84 (Single Queen) \$94 (Double or King) *Plus applicable taxes

Be sure to ask for the "Wine Country Seminar" block reservation

SEMINAR FEE SCHEDULE / CONTINUING EDUCATION CREDIT

	Registration		Continuing Education Credit
	Postmarked or faxed on or before 10/17/09	Postmarked or faxed after 10/17/09	
WINE COUNTRY SEMINAR – 16 hours			Now Available One-Day Registration \$220
NAEA/CSEA Members, Associates, and Affiliates	\$350	\$385	
Non-Members	\$390	\$425	
ETHICS – 2 hours			
NAEA/CSEA Members, Associates, and Affiliates	\$30	\$40	
Non-Members	\$40	\$50	

EAs: The Wine Country Tax Seminar qualifies for 16 (18 with Ethics) hours of Continuing Professional Education (CPE) credit for persons regulated by the Internal Revenue Service. The California Society of Enrolled Agents (CSEA) and its chapters have been recognized as a qualified sponsor of continuing education by the Director of Practice to meet the requirements of 31 Code of Federal Regulations, section 10.6(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors and length of class hours.

CPAs: CSEA is registered with the National Association of State Boards of Accountancy as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards have final authority on the acceptance of individual courses.

CA Tax Preparers: The California Tax Education Council (CTEC) has approved CSEA as a curriculum provider. Successful completion of this program (12 hours of Federal CPE, 4 hours of California CPE) may be reported to fulfill the continuing education requirements of the California Business and Professional Code Sec. 22250-22259.

Refund Policy: Request for registration refund must be postmarked by November 1, 2009. Refunds are subject to a service charge of \$50.

For Additional Information please contact: Jackie Thomson, EA
Phone: (415) 457-5780x4; Fax: (415) 459-5925
e-mail: WineCountryChair@NorthBayEA.org



California Society of Enrolled Agents North Bay Chapter

NorthBayEA.org

Celebrating Over 20 Years of Serving EAs & Taxpayers

OFFICERS:

President:

Raven Deerwater, EA, PhD
(707) 937-1099; Fax (707) 937-1075
raven@taxpractitioner.com

Vice-President:

Richard W. Ogg, EA
(707) 544-5732; Fax: (866) 649-8853
richard@themasterstaxservice.com

Secretary:

Margaret Hadden, EA
(707) 577-7423; Fax (707) 577-7449
mfhadden@gmail.com

Treasurer:

Susan D. Harper, EA
(415) 457-5780; Fax: (415) 457-5925
susan@anspachfinancialgroup.com

Directors:

Carol Carlson, EA
(415) 505-7653; Fax: (415) 789-9912
caroleamst@yahoo.com

Dorothy Clarke, EA
(415) 883-1933; Fax: (415) 883-0240
belmarintax@att.net

Joseph Roberson, EA
(707) 446-1221; Fax: (707) 446-1272
irrob3819@sbcglobal.net

Michelle D. Whipple, EA
(415) 459-6966; Fax (415) 459-7980
michelle@whipplecpa.com

Immediate Past President:

Rob Janes EA
(415) 663-8185; Fax: (415) 663-8189
minitax@svn.net

State Director:

Gary Anspach, EA
(415) 457-5780; Fax: (415) 457-5925
gary@anspachfinancialgroup.com



September 2009

Dear Fellow Tax Professional,

I'm delighted to announce the opening of registration for the 21st Annual **Wine Country Tax Seminar** which will be presented on Monday and Tuesday, **November 9 & 10, 2009**. This year we have made some significant changes to the seminar which we hope you will find innovative and inviting.

First of all we have pushed the two-day seminar into November allowing a bit more time for recovery after the end of the October filing deadlines. Secondly, we have moved the venue from the traditional hotel site to the spacious and convenient **Petaluma Community Center**. This facility provides the larger capacity we need to extend registration to a wider audience and accommodate more vendors. It also enables us to contain the costs of producing this two-day event, cost savings that we are able to pass along to you.

We are not only offering this year's event at last year's prices, but we are also adding a bonus 2-hour Ethics program at no additional cost for those who register by October 1, 2009. This is not your father's ethics class. We're sure you'll find the interactive **Ethics Jeopardy** session, a fun and enjoyable way to satisfy your annual ethics requirement.

You'll be pleased to see that we have continued to maintain the exceptional quality of speakers and programs. We've listened to your suggestions and have added more intermediate and advanced level courses this year. Don't be disappointed when you see that Gary McBride and Tom Daley are missing from the list of Wine Country speakers this year. We've asked them to present their very popular 8-hour federal and CA tax update for our "Last Chance" tax seminar update on January 18, 2010.

For those traveling from outer areas, we have negotiated very favorable group rates for accommodations at the **Best Western Petaluma Inn**, which is one block from the Petaluma Community Center. There is no deadline for the group rate as long as there are available rooms.

For questions about registration, you can contact Pauline Baldenegro, EA: Tel. (707) 577-8291; WineCountryRegistrar@NorthBayEA.org. Please contact me with any other questions about the Annual Wine Country Seminar. Tel. (415) 457-5780 x4; WineCountryChair@NorthBayEA.org.

We have a team of dedicated volunteers working hard to make sure that this is the best seminar you will attend this year. We look forward to seeing you in November.

Jackie Thomson

Jackie Thomson, EA
Chair, 2009 Wine Country Tax Seminar

National Association of Enrolled Agents

Members Enrolled to Represent Taxpayers before the Internal Revenue Service