



ENROLLED AGENT

Feb 2017

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CALIFORNIA TAX UPDATE

February Dinner Topic
See Page 3 for details

What's New
Areas
Kansas and Midwestern
The following tax benefits are available for
qualifying Schedule C filers in the Kansas
and Midwestern disaster areas.

- Employee retention credit
- Deduction
- and clean

Section references are to the Internal
Revenue Code unless otherwise
New

PRESIDENT'S MESSAGE by Joyce Cheng

As we move towards the start of a new filing season, I know we are all faced with challenges considering the change in political climate and direction. We are in this together and I think now more than ever we need to remember that the most important asset we have as an organization is us! Our members are our greatest asset. We need to keep that in mind as we travel through a changing tax topography. We can help others and receive help in return. There will likely be no shortage of questions and confusion. Rely on your colleagues and be available for those who reach out for assistance. We are resourceful. We are here for each other!



A perfect time to boost your resources and get answers to questions is at Tax Help Day on February 4, 2017 at the Tustin Library. The goal is to reach out to the community and increase awareness of Enrolled Agents, but this event has typically provided the volunteers with a perfect opportunity to swap questions and answers encountered in problematic cases. I encourage you to participate!



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OCEA is 372 Members Strong



Just 4 Fun



FEBRUARY 21 DINNER MEETING

California Tax Update

Presented by Lynn Freer, EA



Lynn Freer, EA is the owner of Spidell Publishing, Inc. and a highly regarded member of OCEA. Spidell is the leading authority on California Taxation. This one hour dinner meeting will highlight California's non-conformity issues with Federal Tax and other relevant topics involving our tax practices. It is with great pleasure we welcome Lynn Freer.

[CLICK HERE
TO REGISTER](#)

Make Sure You Get Your CPE Credit

Please write in your correct PTIN number and other information legibly when signing in at the meeting.

It is important that you get the CPE credit, but if the information you enter is not correct and/or is unreadable, the credit cannot be issued to you.

Agenda:
 4:15 Board Meeting
 5:30 Social Time
 6:00 Dinner Hour
 7:00 Presentation
 CPE State 1, Federal 0
 \$40/\$45 on or before 2/16/17
 \$45/\$50 after 2/16/17

Feb 21, 2017
 Phoenix Club
 Grand Ballroom
 1340 S Sanderson Ave
 Anaheim, CA 92806
 (see last page for map)

A LINK TO DOWNLOAD ANY AVAILABLE COURSE MATERIALS IS INCLUDED IN YOUR REGISTRATION CONFIRMATION EMAIL. NOT ALL COURSES PROVIDE MATERIALS.



Nominations for the 2017 OCEA Board of Directors



President:
Joyce Cheng



1st VP:
David Hilliard



2nd VP:
Christine Davidson



Secretary:
David Shashoua



Treasurer:
Nancy Cahill



Director:
Tony Alvarez



Director:
Louis Avalos



Director:
Joe Davidson



Director:
Parag Karia



Director:
Ron Schlegel



CSEA Director:
Bill Stewart



Immediate Past President:
John Kristianson



Practice Management Corner

by Louis Avalos, EA

Greetings!

It's the new tax season for 2017 we are all off and running very hard and fast. However need to review some last minute considerations that the IRS is very concerned about. They don't want us to lower our guard and become a victim of a security breach this will cost you money and your reputation.

1. Secure hardware.
2. Locked cabinets and door locks are they all safe?
3. Passwords you renewed them all for 2017 correct?
4. Emailed documents must be password protected.
5. Incoming documents use a lockbox or find a provider.
6. Review modems/routers if older than three years replace.
7. Go paperless scanners and use electronic file folders with backups.
8. Update software especially virus and operating system software.
9. Don't accept emails looking for tax help with an attached document.
10. Review the IRS website for the latest tax scams.



EA NEEDED

The OCEA education team is looking for a few good EAs to assist on a one-time, short term, or long term basis. Jobs and time commitment vary but the rewards are the same – great people, great education and we'll even throw in a little fun (but don't tell Uncle Sam or he'll figure out a way to tax that too!) **Contact David Hilliard for details: 714-609-1486 or dhilliard@gtbsonline.com**



Have Something To Say...

Readers are encouraged to submit letters to the editor on topics involving our tax profession.

Readers can also voice their opinion on matters concerning our chapter. Please include your full name and phone number.

Email: 4quelle@msn.com



It Doesn't Take a Genius

by Julie Dailey, EA

A do-it-yourself tax software ad says “it doesn’t take a genius to do your taxes.” That is quite correct. It doesn’t take a genius to do your taxes. It also doesn’t take a genius to do the wiring in your house nor does it take a genius to install a toilet. It doesn’t take a genius to make a soufflé; and it does not take a genius to change the brakes on your car. All of these things you can certainly do yourself. If you figure them out without training or experience, you may luck out and not get electrocuted, or flood your house, or serve an embarrassing dessert to your guests, or hit something because your brakes fail. Yes, you can certainly do your own taxes, but you don’t know what you don’t know. The IRS knows this about do-it-yourselfers, and gives those tax returns more scrutiny. You don’t need me to do your taxes and you also don’t need insurance on your house. But, once your house is in flames and your tax return under scrutiny, you’re going to wish you had spent the money. FYI, I can tell you, there is now a whole industry, employing many Enrolled Agents, to only represent tax payers self prepared returns. Hire an Enrolled Agent. Maybe a genius, maybe not, but we are highly educated and experienced in the field of income taxes....and these days, it is more important than ever to avoid dealing with the IRS.





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www.csea.org

Tax Help Day Announcement for CSEA Local Chapter Newsletters or Chapter Business Meetings

The CSEA statewide Tax Help Day is February 4, 2017. Tax Help Day is a free public service of CSEA and its Chapters. We are seeking volunteers from the Chapter to meet with taxpayers and answer questions on a wide variety of tax topics like the Affordable Care Act, running a business, buying a home, getting married, and much more.

Help taxpayers with their tax questions in person for **number** hours at **name and address of hosting/sponsoring organization**. We will be answering questions verbally, not preparing any returns, and not collecting any fees. Help promote your Enrolled Agent status with the public and with **name of organization hosting/sponsoring the event, such as a local library or Chamber of Commerce**.

Volunteering can be challenging, especially in the heart of tax season. However, if Member volunteers schedule time to participate in this event just as they would schedule time for a client appointment, it becomes workable.

Tax Help Day also fits in with CSEA's Strategic Plan, working to increase awareness of CSEA and cultivating alliances with other organizations to increase visibility of Enrolled Agents. For additional information about this event, please contact your Chapter President or email CSEA Public Information & Awareness Committee Chair Pamela Price, EA at pam@pamelapriceea.com, Vice Chair Bill Stewart, EA at bill@sanjuanfinancial.com, or staff liaison Jana Perinchief at jperinchief@csea.org.



TAX HELP DAY

SATURDAY, FEBRUARY 4, 2017

www.findanea.org/tax-help-day

About the Event

Tax Help Day is a free Public Service of the California Society of Enrolled Agents and its Chapters. Local tax professionals will be available to answer your questions on a wide variety of tax topics like the Affordable Care Act, running your own business, buying a home, getting married, and much more. Please bring any relevant tax documents and information with you, so your EA Volunteer can better assist you.

Volunteer Enrolled Agents will not charge for answering questions on this day and will not prepare any returns, nor will they provide any written advice or bill anyone.



**Convenient
Location**

Tax Questions?

Get Answers

**Enrolled Agents
America's Tax Experts**

Topics Covered

**Affordable Care Act
Business Deductions
Buying a Home
Retirement Planning
Rental Properties
Tax Credits
and Many More!**

**TAX HELP DAY
TUSTIN LIBRARY
Saturday
February 4, 2017**

info@csea.org

1-800-TaxPro-5

CLASSIFIEDS

LOOKING TO PURCHASE A TAX/BOOKKEEPING PRACTICE preferably in South Orange County or North San Diego county. Currently practicing in Irvine over 10 years serving individual, corporate, and partnership. Please contact David Wang, EA, Quickbook Advisors at (949) 228-4972 or email irvinebookkeeping@gmail.com. 12/16

GFS, INC., a Yorba Linda based firm, is currently recruiting an Income Tax Preparer for the upcoming tax season. Tax Preparer must be either an Enrolled Agent or CPA in good standing, and have extensive tax preparation experience in a fast-paced, high volume environment working face-to-face with clients. Tax Preparer must know Lacerte software and be willing to work 8:00 AM to 5:30 PM Monday through Saturday for the entire tax season. Pay range is \$20.00 to \$30.00 per hour depending upon experience. Please submit your inquiries and resumes to Gary Gray at gary@gfs4tax.com 12/16

EA NEEDED: The OCEA education team is looking for a few good volunteer EAs to assist on a one-time, short term, or long term basis. Jobs and time commitment vary but the rewards are the same – great people, great education and we'll even throw in a little fun (but don't tell Uncle Sam or he'll figure out a way to tax that too!) Contact David Hilliard for details: 714-609-1486 or dhilliard@gtbsonline.com

EMPLOYMENT OPPORTUNITY. Established Tax and Accounting office in Huntington Beach is looking for an Enrolled Agent with a minimum of 5 years experience to prepare returns initially during tax season and partnership opportunity in the future. Must be proficient with Ultra Tax software. Also, looking for a part-time bookkeeper with a minimum of 5 years experience and proficient with MAS 90 software. Please call Phil Boodman at (714) 801-5433. 08/16

HELP WANTED: Full-time support position in Orange County EA office. Full charge bookkeeping expertise required, with QuickBooks® software experience. Duties include oversight of business clients' general ledgers, after-the-fact payroll calculations, payroll tax return preparation, 1099 compliance, business entity return data entry and e-file (tax returns and information returns). Tax return assembly, billing and various admin duties as needed. Fax resume to Vicki Mulak, EA at (714) 731-4809. 08/16

Classifieds available for OCEA Members & associates to advertise items for sale or rent, want ads & employment opportunities. Ads run for 2 consecutive months free of charge (longer based on space available. Let us know when your ad is no longer needed). Email to 4quelle@msn.com. Include your name & phone number or email.



THE LAW OFFICES OF BARNETT & RUBIN

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UPCOMING PROGRAMS & EVENTS

<i>DATE</i>	<i>PROGRAM / EVENT</i>	<i>CPE</i>	<i>SUBJECT</i>	<i>LOCATION</i>
Feb 21, 2017	Dinner Meeting	1	California Tax Update	Phoenix Club, Anaheim

**Advertise in the
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**The best way
to get your message
in front of the
EA community.**

**Call Jack Lifshin
562-596-4150
to place your ad.**

OCEA IS LOOKING FOR TOMORROWS LEADERS TODAY

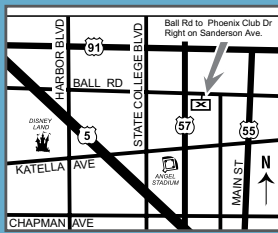
If you're a regular member of OCEA in good standing and would like to be a part of the leadership of your Chapter then please contact Jack Lifshin, EA at jdltax@earthlink.net for more information.

Dinner Menu For This Month

- Roast Pork with Homemade Gravy
- Orange Roughy
- House Mix Greens Salad
- Chef's Butter Leaf Salad and Poppy Berry Dressing
- Mashed Potatoes
- Spinach & Mushrooms Saute
- Apple Strudel
- Black Forest Cake

The Vision of OCEA is to serve, to represent the best interests of Enrolled Agents in Orange County, and to emphasize and enlighten the general public that an Enrolled Agent is the premier tax professional.

The Mission of OCEA is to encourage professionalism, personal growth, and educational growth, while providing member benefits and enhancing the role of Enrolled Agents among the local governmental agencies, other professionals, and the general public.



Meetings are held at the Phoenix Club
1340 S Sanderson Ave, Anaheim, CA 92806
4:15 Board Meeting, 5:30 Social Time, 6:00 Dinner Hour, 7:00 CPE Program
 \$40 for Member pre-registration before midnight on the Thursday prior to the dinner meeting; \$45 for late or on-site registration and for non-members for meetings with 1 hour of CPE credit. Meetings with 2 hours of CPE credit are \$50 and \$55 respectively. To make a reservation go online to our web site www.eaoc.org and select the sign up button next to the event you would like to attend and follow the prompts. If you incur any difficulties signing up, contact Joe Guccione, EA (714) 842-5285, with a message including your name as it's registered at IRS and your phone number and your PTIN.