



2022 – 2023 (49<sup>th</sup>)

BOARD

**President**

Kimberly Mellinger-Cheng, E.A

**First Vice President**

Vacant

**Second Vice President**

Vacant

**Secretary**

David Samuel Shashoua, J.D.,  
L.L.M., E.A.

**Treasurer**

Nancy Navarro-Walker, E.A.

**Immediate Past President**

Patricia M. Kappen, E.A.

**CSEA Director**

Louis R. Avalos, E.A.

**Board Members:**

Ken Blake, C.P.A., E.A.  
Dan Dabelstein, E.A.  
Marilyn Ratliff, E.A  
Christine Trinh, E.A.  
Vacant

**California Society of Enrolled Agents  
Orange County Chapter  
Board of Directors Meeting for the 2022 – 2023  
(49<sup>th</sup>) Term  
May 16, 2023**

**The Tax Professionals**

**I. Call to Order:** Board of Directors Meeting was called to order at 3:39pm at the Santa Elks Lodge # 794, in the City of Santa Ana, County of Orange.

The following Board Members were present & responded to their names, viz:

Kimberly Mellinger-Cheng, EA - President;

David Samuel Shashoua, JD, LL.M, EA – Secretary;

Nancy Navarro-Walker, EA – Treasurer - not present, but duly excused.

Kenneth Blake, CPA, EA – Director,

Dan Dabelstein, EA – Director;

Marilyn Ratliff, EA – Director;

Christine Trinh, EA – Director;

Louis Avalos, EA – CSEA Director;

Patricia M. Kappen, EA – Immediate Past President – not present, but duly excused.

Guests: CSEA President David Hillard, EA; Joe Davidson, EA; Hung Pham, EA; Dan Calberg, EA.

It was determined that a quorum of the Board Members was present.

**II. Minutes** - The minutes for the Board Meeting of February 21, 2023, were approved.

**III. Treasurer's Report** - The Treasurer, Nancy Navarro-Walker, EA, delivered a Treasurer's Report, accumulated to February 28, 2023, subject to audit of the Examination Committee.

There were discussions and concerns on CSEA's delay on depositing our revenue from the CSEA Learning Hub, but everything got updated as of May 15, 2023.

**VI. Education Committee**

The Monthly Dinner Meetings have been planned out as follows:

May 2023 – Joe Davidson, EA, topic is on the Clergy.

The June 2023 Chapter/Dinner Meeting shall be on June 27, 2023, due to conflict with CSEA's Super Seminars and its Board/Committee Meetings.

Also the SEE Class would be starting to be worked on by Louis Avalos, EA – CSEA Director. Ryan Reichert, EA of Brass Tax Seminars and Shannon Hall, EA is teaching the SEE Class, possibly at the Holiday Inn in Santa Ana – nearby the Orange County Airport on July 20, 2023; July 21, 2023; August 10, 2023; August 11, 2023; and August 12, 2023, and so far 20 attendees have signed up, but need 35 to break even.

Articles for the Newsletter, now known as blogs, are always due on the Monday after a Board Meeting.

Also, the \$3,000 Scholarship to California State University of Fullerton has been cashed.

The 2022 -2029 (49<sup>th</sup>) Board then declared its Term duly completed and declared itself duly dissolved, and stood at an adjournment sine die.

Respectfully Submitted By,



David Samuel Shashoua, JD, LLM, EA, Secretary