

NAEA Bylaws Amendments = What All Members Need to Know

From: CA Society of Enrolled Agents (info@csea.org)

To: ddabelstei@aol.com

Date: Thursday, October 19, 2023 at 01:11 PM PDT

Important Information - Please Read!

View this email [in your browser](#).



California Society of Enrolled Agents
Powering California's Tax Experts

Learning Hub | CSEA.org



CSEA members who are also NAEA members were recently notified by NAEA that there are three amendments to the bylaws that will be presented to the membership for vote in December 2023.

NAEA has provided [detailed information on their website \(login required\)](#), and we have summarized it below, with emphasis on how these changes might affect dual-status members and how they might impact CSEA's standing with NAEA.

Background

In response to declining membership, NAEA's Board of Directors created a Component Structure Task Force in 2022 to determine if there are structural issues contributing to membership loss, to identify organizational barriers to membership growth and retention, and recommend alternative organizational models to address these issues and barriers.

The Task Force presented recommendations to the Board that require amendments to NAEA's bylaws before they can be implemented, and the Board has put the proposed amendments before the membership for consideration and vote. The proposals are not contingent upon one another, and the membership can vote to adopt all, none, or a combination of the proposed amendments.

1. Elimination of the 30-hour CE requirement for membership

The Task Force identified the 30-hour annual CE requirement as a barrier to membership, particularly for new EAs. If this proposal is approved, Enrolled Agent members will still be subject to IRS continuing education requirements:

- 72 hours of CE every three years
- A minimum of 16 hours per year, 2 of which must be ethics

Note: CSEA bylaws require a minimum of 30 hours per year. Elimination of the 30-hour requirement by NAEA would not change the requirement for CSEA members and associates.

2. Remove the dual membership requirement with state affiliates

The Task Force identified the requirement to belong to both the national and state organizations as a barrier to entry that resulted in both organizations losing new members. This bylaws amendment would remove that requirement.

Note: If this amendment is approved, CSEA would no longer be out of compliance with NAEA's bylaws.

3. Allow for the establishment of chapters

The Task Force identified the state affiliate model as a contributing factor in membership decline and provided several supporting arguments which are included on [NAEA's website \(login required\)](#). Establishment of state chapters in place of affiliates has been proposed to improve the delivery of member services throughout the nation and lighten the burden of governance at the state level.

Existing state affiliates that do not wish to become chapters will have the option of petitioning the NAEA Board to be chartered as a NAEA State Affiliate. The Task Force has conducted meetings with existing state affiliates to develop an outline of what commitments and expectations would be established between NAEA and chartered affiliates, and between NAEA and state chapters. If this amendment passes, the rules surrounding chapters and chartered affiliates will be further refined throughout an implementation cycle, with ongoing review and adjustment as needed.

Note: If this amendment passes, the CSEA Board of Directors will determine if we should submit a petition to become a chartered affiliate of NAEA. The commitments, obligations and opportunities associated with the affiliate relationship are provided in a [PowerPoint presentation that you can download](#).

CSEA and NAEA share the same origin story and both organizations are committed to serving the EA profession and supporting members. The work that NAEA does at the national level benefits all California EAs. CSEA serves the unique needs of those who practice in California and supports our EA communities in ways that are best done locally. Although CSEA no longer

enjoys the standing that comes with being an affiliate, we still have an ongoing relationship with NAEA and the lines of communication are strong.

If you are an NAEA member, we encourage you to vote when the time comes. Until then, please visit the [NAEA website \(login required\)](#) to learn more and find information on Town Halls and a special discussion thread on the NAEA Member Web Board.

Stay Connected:



California Society of Enrolled Agents | 3200 Ramos Circle | Sacramento, CA 95827
Website: www.csea.org | Phone: 916-366-6646 | Fax: 916-366-6674 | Email: info@csea.org

Copyright ©2023. All Rights Reserved.

[Unsubscribe](#)

