



2022 - 2023 (49th)
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
(49th) Term
December 6, 2022**

The Tax Professionals

I. Call to Order: Board of Directors Meeting was called to order at 3:42pm 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, LLM, EA – Secretary;

Nancy Navarro-Walker, EA – Treasurer;

Kenneth Blake, CPA, EA – Director, not present; but duly excused;

Dan Dabelstein, EA – Director;

Marilyn Ratliff, EA – Director – not present, but duly excused;

Christine Trinh, EA – Director;

Louis Avalos, EA – CSEA Director;

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

Guests: Peter Globe, EA

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

II. Minutes - The minutes for the Board Meeting of November 15, 2022, were approved.

III. Treasurer's Report - The Treasurer, Nancy Navarro-Walker, EA, did present a Treasurer's Report, accumulated to November 30, 2022, subject to audit of the Examination Committee.

IV. Visiting a Chapter -

Some Members & Board Members attended a Board/Dinner Meeting of the Palomar Chapter, there were only 20 attendees out of 200 Members, no friendly greeters, and no one really talked that much.

V. Education Committee

The Monthly Dinner Meetings have been planned out as follows:

January 2023 - Jane Ryder, EA - topic: The Quickfinder/Taxbook Mini Federal Update;

February 2023 - Shannon Hall, EA - topic: California Update

March 2023 & April 2023 the Chapter shall be dark, with a possible Zoom informal meeting in March, and a possible "Thank God It's Over" celebration in April.

Also the SEE Class would be started to be worked on January 2023

VI. Newsletter/Website

A new designer/printer as been hired/established through Medina Marketing at a \$100 one-time set-up fee, and a \$75 per month as a PDF print.

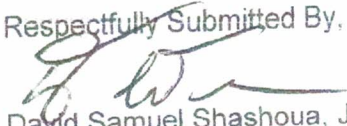
Articles for the Newsletter, now know as blogs, are always due on the Monday after a Board Meeting.

VII. New Business

There was a general discussion and negative criticism of CSEA's proposed due increase from \$225 per annum to \$265 per annum.

The Board then adjourned at 4:33pm until its next scheduled meeting of January 17, 2023 at 3:30pm.

Respectfully Submitted By,


David Samuel Shashoua, JD, LLM, EA, Secretary