



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  
February 21, 2023**

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**The Tax Professionals**

**I. Call to Order:** Board of Directors Meeting was called to order at 3:43pm 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;

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: None.

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

**II. Minutes** - The minutes for the Board Meeting of January 17, 2023, were approved.

**III. Treasurer's Report** - The Treasurer, Nancy Navarro-Walker, EA, did present a Treasurer's Report, accumulated to January 31, 2022, subject to audit of the Examination Committee.

## **VI. Education Committee**

The Monthly Dinner Meetings have been planned out as follows:

February 2023 - Shannon Hall, EA – topic: California Update, so far 32 attendees have signed up.

March 2023 & April 2023 the Chapter shall be dark, with a Zoom informal meeting on March 12, 2023 at noon, another one on April 7, 2023 at 6pm, and "Thank God It's Over" celebration on May 15, 2023 at Avlia Restaurant in Santa Ana, please RSVP with Marilyn Ratliff, EA.

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, this shall be requested to the Elk's Lodge.

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.

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

The Board then adjourned at 4:40pm until its next scheduled meeting of May 16, 2023 at 3:30pm.

Respectfully Submitted By,

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