



2022 – 2023 (49th)
BOARD

President

Kimberly Mellinger-Cheng, E.A

First Vice President

Vacant

Second Vice President

Vacant

Secretary

David Samuel Shashoua, J.D.,
LL.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
November 15, 2022**

The Tax Professionals

I. Call to Order: Board of Directors Meeting was called to order at 4:00pm 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 – 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; Joseph Davidson, EA

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

II. Minutes - The minutes for the Board Meeting of October 18, 2022, were approved.

The Secretary, David Samuel Shashoua, JD, LL.M., EA, reported that Director-Elect, Christine Trinh, EA, has been inaugurated, installed, and duly seated as a Director for the OCCSEA for the remaining 2022 – 203 (49th) Term.

III. President's Report - CSEA is being too slow in terms of both with CE processing and money processing. E-Z Signup (the successor to 123Signup) is offering the same rates for CE processing, with a \$125 set-up fee.

Also the Monthly Dinner Meetings have been planned out as follows:

December 2022 – David Woods, EA - topic "How to Review a Tax Return";

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.

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

There was a general discussion of how to communicate better to the Members at large, and Non-Members alike via social media, and/or even cater the Dinner Meetings and other seminars towards practice management.

Possible joint effort with Brass Tax in June 2023 or July 2023, stay tuned.

V. Newsletter/Website

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

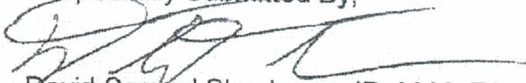
Also, if anyone needs for an updated badge, see Dan Dabelstein, EA.

VI. Scholarship

Dan Dabelstein, EA has issued the attached to California State University at Fullerton, College of Business and Economics, in the Chapter's award on the \$3,000 scholarship that the 2020 – 2021 (47th) Board allocated back on May 26, 2021.

The Board then adjourned at 4:31pm until its next scheduled meeting of December 5, 2022 at 3:30pm.

Respectfully Submitted By,


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