No April Meeting

OCEA IS SEEKING
Nominees for OCEA Board of Directors
Stand Up, Make Your Voice Heard, Give Back to Your Profession
Your Opportunity is NOW!

Contact Joe Guccione at gucci-one@msn.com

Meetings are held at the Phoenix Club
1340 S Sanderson Ave, Anaheim, CA 92806

No April Meeting

$35 for Member pre-registration before midnight on the Thursday prior to the dinner meeting; $40 for on-site registration and for non-members for meetings with 1 hour of CPE credit. Meetings with 2 hours of CPE credit are $45 and $50 respectively. To make a reservation go online to our web site www.eaoc.org and select the sign up button next to the event you would like to attend and follow the prompts. If you incur any difficulties signing up contact Donna Miller at 562-424-2411
About this time of the year, I am not sure whether I feel like a long distance runner, a 100 yard dash star, or just a hamster on an exercise wheel. I love the time that I spend with my clients, which is the part of this profession that invigorates me the most. But the feeling that “I cannot stop during this three month period can wear on me. The irony of this time of year is that all of those travel companies are sending out their brochures for the year. So when I receive my mail, there are bike trips to here or cruises to there. The only trip I make is from my home to my office and back, and can only dream about the cruise on the Danube or a bike trip in the San Juan Islands.

If you had the opportunity to attend the dinner meeting this month and hear Steve Sims from the Franchise Tax Board, I am sure you will agree that it was time well spent. I picked up some valuable tips on working with the Franchise Tax Board. I also felt like I was at a comedy club. Steve is an informative AND entertaining speaker. I think everyone who attended enjoyed the evening.

One interesting note came up during Steve’s talk, and that was the importance of the annual State Agencies Liaison Meeting which occurs in September in Sacramento. This is an event that our own Vicki Mulak orchestrates. And from what Steve said, it helps the state agencies keep up with what is going on in the practitioners’ world. Steve mentioned on several occasions that it is his relationship with CSEA, Spidell and the professionals he knows, that help him within the Franchise Tax Board to keep “it real”.

As you all know, during the month of April, we will be “dark” for that month. There will not be a dinner meeting nor any educational event. This is the final sprint to the end of the tax filing deadline and extensions. But starting up in May, we will have our previous Past President, Russell Fox speaking on Ethics. That is a great opportunity to get those 2 educational hours that are required each year and reconnect with many of our members.
Also in May and June time we will be having our elections and annual retreat. This is the time that we plan for the coming year and install our newly elected leaders. In speaking with Joe Guccone, head of the nominating committee, I was extremely disappointed at the lack of response by the membership of OCEA in volunteering for positions on the board and committees this year. We have a large chapter, the largest in the country, and yet, we have very few people who want to work on keeping the chapter vibrant with exciting educational events. These dinner meetings and events don’t happen by themselves. It takes a little planning and some effort to put them on. When no one steps up to assist, what will be the result? I think that sound of “one hand clapping” might be an accurate description.

I would ask the past presidents and people who have served on the board of directors to reach out to other members personally and offer your insights on the value in being part of the leadership team. Emails are good to get the word out. This newsletter can advertise events and happenings. But when it comes to developing the chapter leadership, sometimes it is the personal connection and the interaction that can effectively communicate the value of being part of something bigger. That would be OCEA.

On that note, I want to wish all of you a great sprint to the finish. Whatever you do to keep focused and clear headed in this final rush, keep doing it. Have a great finish to the 2012 tax season, rest up and see you in May!
OCEA DOCUMENT
SHREDDING DAY
Sponsored by SHREDWISE OF ORANGE
714 282-7771

SATURDAY MORNING
May 19, 2012
550 E. CHAPMAN AVE
ORANGE, CA 92866
Time: 9:00 – 1 PM

1-4 BOXES $10
5-10 BOXES $20
11 OR MORE CALL FOR PRICE
714 774-8129

Available to all OCEA Members,
Staff, Friends, and Clients
SESSIONS BEGINNING JUNE 23, 2012

The Orange County Chapter of the California Society of Enrolled Agents is offering a review class to prepare YOU for the IRS Special Enrollment Exam.

Please note, this is a fast paced review course and it is highly recommended that attendees have some experience in preparing both individual and business income tax returns.

**Part 1:** Individual Taxation
- June 23, June 30 and July 7

**Part 2:** Partnerships, C Corporations, S Corporations, Fiduciaries and other topics
- July 14, July 21, July 28, August 4, August 11, and August 18

**Part 3:** Practice before the IRS, Power of Attorney, Ethics and other topics
- August 25

**Course Fees:**
- Early Registration: May 15, 2012 $1,095 for the three parts
- First Registration Deadline: June 1, 2012 $1,245 for the three parts
- Final Registration Deadline: June 8, 2012 $1,345 for the three parts
- Textbook and online access for test taking is included in the registration fee.

**Register online at www.eaoc.org or use the form below**

Enclose your check made payable to: Orange County Chapter, CSEA. OR charge to your credit card.

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- Credit card number
- Exp. Date
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- City
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**Mail to:** Patricia Kappen, 31726 Rancho Viejo Rd. # 215, San Juan Capistrano, CA 92675
**Fax to:** 949-496-8084 Email: patti@sanjuanfinancial.com or patreece@aol.com

It is OCEA’s policy not to issue refunds once a registrant has registered for an event or class. However, a written refund request can be submitted to OCEA’s treasurer by the next board meeting for consideration by the board in the following three cases: (1) Cancellation at least 72 hours before the event, or (2) a medical emergency preventing the registrant from attending the event, or (3) a death in the family.
Past due financial obligations can affect your current federal tax refund. The Department of Treasury’s Financial Management Service, which issues IRS tax refunds, can use part or all of your federal tax refund to satisfy certain unpaid debts.

Here are eight important facts the IRS wants you to know about tax refund offsets:

1. If you owe federal or state income taxes, your refund will be offset to pay those taxes. If you had other debt such as child support or student loan debt that was submitted for offset, FMS will apply as much of your refund as is needed to pay off the debt and then issue any remaining refund to you.

2. You will receive a notice if an offset occurs. The notice will include the original refund amount, your offset amount, the agency receiving the payment and its contact information.

3. If you believe you do not owe the debt or you are disputing the amount taken from your refund, you should contact the agency shown on the notice, not the IRS.

4. If you filed a joint return and you’re not responsible for the debt, but you are entitled to a portion of the refund, you may request your portion of the refund by filing IRS Form 8379, Injured Spouse Allocation. Attach Form 8379 to your original Form 1040, Form 1040A, or Form 1040EZ or file it by itself after you are notified of an offset. Form 8379 can be downloaded from the IRS website at www.irs.gov.

5. You can file Form 8379 electronically. If you file a paper tax return you can include Form 8379 with your return, write “INJURED SPOUSE” at the top left of the Form 1040, 1040A or 1040EZ. IRS will process your allocation request before an offset occurs.

6. If you are filing Form 8379 by itself, it must show both spouses’ Social Security numbers in the same order as they appeared on your income tax return. You, the “injured” spouse, must sign the form. Do not attach the previously filed Form 1040 to the Form 8379. Send Form 8379 to the IRS Service Center where you filed your original return.

7. The IRS will compute the injured spouse’s share of the joint return. Contact the IRS only if your original refund amount shown on the FMS offset notice differs from the refund amount shown on your tax return.

8. Follow the instructions on Form 8379 carefully and be sure to attach the required forms to avoid delays. If you don’t receive a notice, contact the Financial Management Service at 800-304-3107, Monday through Friday from 7:30 a.m. to 5 p.m. (Central Time).
CLASSIFIEDS

TAX PRACTICE WANTED: Looking to purchase a small to medium tax book of business. Currently practice in Tustin serving individual, corporate, partnership and trust clients. Please contact John Rumbold, EA, CFP® at 714-425-7202 or jrumbold@rfta.biz 03/12

EA POSITION AVAILABLE IN LA MIRADA. Seeking an Enrolled Agent that has extensive experience with preparing multi-state individual tax returns, partnership tax returns, trust tax returns, and corporate tax returns. Applicant must possess exceptional organizational and customer service skills. Please contact Sonya Scott at Philip L. Liberatore CPA (714) 522-3337. 03/12

IMMEDIATE PART TIME JOB OPPORTUNITY for EA or CPA to prepare tax returns for financial office in Irvine during tax season. Please email resume to Brad Fries at gbfries@afm-llc.com. 01/12

SEEKING UNPAID INTERNSHIP or Administrative Position in a CPA firm or EA office for NAEA experience. I was an executive secretary for 10 years but left the workforce to raise my children. I will obtain an Associate’s Degree in Accounting by 2012. Last year, I spent four days per week preparing tax returns for both OC Legal Aid Society (VITA) and the AARP (TCE) utilizing CCH Tax-Wise. I am familiar with Intuit’s Lacerte, QuickBooks and certified/bonded with CTEC and registered with an IRS-PTIN. If your firm is working toward a paperless office, I could assist you with PDF/OCR scanning plus creating blogs, tweets and websites. Please contact me when seeking a professional, reliable and articulate employee. Contact Jean Krieger at (949) 677-8301. 01/12

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EA OFFERING EXPERTISE AND SERVICE: Are you looking for someone to help you with collection cases? My office capacity can take some more load to carry some of yours. Preferably Collection cases where you need aggressive negotiation and removal of bank levy and wage garnishment with the IRS. Will negotiate on a per case basis. Call Edward Daoud, EA at (949) 248-1845 or email eaadvisor@cox.net. 11/11

EA & CFP seeking a professional to share furnished office space (with windows) in nice office building in Belmont Heights, Long Beach. Office space is approximately 600 square feet. Share rent, DSL, Telephone. Expenses run about $1,000 per month. Each of us will pay $500 per month. We would coordinate days using office. I use office to interview clients only. Need office about 2-3 days a week and sometimes on Saturdays & Sundays during tax season. Call Sallie Allen (562) 900-0319 or email sallieeacfp9@aol.com 11/11

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Classifieds available for OCEA Members & associates to advertise items for sale or rent, want ads & employment opportunities. Ads run for 2 consecutive months free of charge (longer based on space available. Let us know when your ad is no longer needed). Email to 4quelle@msn.com. Include your name & phone number or email.

Spidell's Analysis & Explanation of California Taxes® 2012 Edition (For preparing 2011 tax returns) $99 more sales tax and shipping

- All meat, no filler — we concentrate on California law, not federal. Other so-called “California handbooks” are almost half federal!
- Examples, flowcharts, worksheets, and contact information that the other handbooks don’t give you! And the A&E is easy to understand and extensively cited!
- Written by California tax professionals for California tax professionals.

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