



## Mission Society of Enrolled Agents Newsletter November 2016 Edition

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### MSEA COMMITTEE MEETINGS

#### Membership:

**Just Ask One lunch incentive!**

Invite a colleague that has yet to discover the benefits of membership!

First Lunch is on us!

for more info contact

[education@missioneas.org](mailto:education@missioneas.org)

**EDUCATION:  
November 10th**

#### Agenda:

**2017 Education Topics  
Monthly Speakers**

**Public Info &  
Awareness : TBA**

### Mission Society of Enrolled Agents

*What does Chapter of the Future look like?*

Fellow Enrolled Agents,

You may have read the book *Firm of the Future* by Ronald Baker and Paul Dunn. While its certainly not a new book, this Guide for Accountants, Lawyers and Other Professional Services is ringing true today! Just like the New Shared Economy, the future of this industry is changing exponentially!

What does this mean for the future of Enrolled Agents? For the future of this Society? This Society has successfully defended our rights to practice before the IRS since 1972. Founding leaders have given us the power to take this organization to new heights! These heights begin with YOU!

You are Unique in what you do! Your expertise in various Business Entities, or Clergy Returns, or Non Profits, or Foreign Assets, etc is what other tax professionals want to hear about! Your experience in Leadership and Practice Management needs to be shared with your peers!

**YOUR Leadership will shape the Chapter of the Future! This is not something that will begin at some future point in time, IT HAS BEGAN!**

Develop Leaders within your own firm! Allow them time to volunteer on MSEA Board of Directors and Committees! Emphasize your staff to become all they can be by providing tools for Leadership, better Communications, effective Networking, and Tasks Oriented skills. You will not only create a more effective employee, you are helping to shape the Chapter of the Future!

Mission Society Board of Directors welcomes all members interested in taking part in Leadership to the next meeting on November 15th at 10am. See you in the Future!

Upcoming event:  
**TAX HELP DAY**

[Committee Calendar](#)



Susan Amaral, EA  
MSEA Vice President  
Newsletter Chair  
PIA Chair  
Office Liaison

MSEA Educational Offerings...



**Monthly Luncheon**

November 15, 2016 11:30-2:10pm

LOCAL CLASSIFIEDS

**Scotts Valley**

**ENROLLED AGENTS & TAX PREPARERS WANTED**

**OFFICE SPACE IN MENLO PARK**



California Society of Enrolled Agents  
Mission Chapter

**California Society of Enrolled Agents**

**Jim Stern Day 2017**  
January 9, 2017

- [Board Meeting](#)
- [Committee Meetings](#)

January 7 & 8 2017



**National Assn of Enrolled Agents**

**Member Get a Member Campaign**

We know our members are the best possible source of

Speaker: *Vivian Redmar*  
Subject: Tax Strategies Using Charitable Giving, Charitable Trusts, Private Foundations

This class will prepare attendees for year-end and tax season advise to clients who have a large potential capital gain, would like to leave a legacy for charity and their family, but want control of their donations. Vivian Redmar packs a great deal of information in the the two hours of CE, including strategies and examples using direct giving, private foundations, donor advised funds, supporting organizations, charitable remainder trusts and charitable lead trusts. Ms Redstar will provide examples, caveats and details , including UBTI, mortgages, part gift/part sale, grants to individuals, overseas grants, appraisals, and a comparison of the various types of funding vehicles.

**Special Enrollment Exam Boot Camp:**

**Intensive training to pass Levels 1 & 2 of the IRS Special Enrollment Exam**

**November 5th, 12th & 19th 8:30am - 4:30pm**

**FEES:**

|                            |              |
|----------------------------|--------------|
| <b>3Day Bundle;</b>        |              |
| <b>CSEA Chapter Member</b> | <b>\$400</b> |
| <b>NON Member</b>          | <b>\$550</b> |

|                            |                      |
|----------------------------|----------------------|
| <b>Single Days;</b>        |                      |
| <b>CSEA Chapter Member</b> | <b>\$150 per day</b> |
| <b>NON Member</b>          | <b>\$195 per day</b> |

**Walk In;**

new members. Help NAEA grow by referring a colleague today.

**CSEA Chapter Member \$425/\$150 per day**  
**NON Member \$575/ \$195 per day**

**Materials must be purchased separately prior to the event. Contact Gleim Publications @ 1.800.874.5346 x421.**

**Who Should Attend:**

**Students now taking EA review classes, CTEC registered preparers that want to become EAs, or anyone interested in taking the SEE to become an Enrolled Agent!**



California Society of Enrolled Agents  
Mission Chapter

Join Our List

Join Our Mailing List!

Like us on Facebook

**Day One: November 5, 2016**  
**Continue review of Part 1 (Individuals)**  
**CE: 5hrs Federal Tax Law**

**Day Two: November 12, 2016**  
**Continue review of Part 2 (Businesses)**  
**CE: 5hrs Federal Tax Law**

**Day Three: November 19, 2016**  
**Continue review of Part 2 and review Part 3**  
**CE: 2Hrs Ethics**

Contact: [office@missioneas.org](mailto:office@missioneas.org) for more information

CONTACT MSEA

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2021 The Alameda,  
Suite 280  
San Jose, CA 95126

**Local Area Chapter Educational Offerings...**



**Golden Gate is offering the 32nd Annual Fall Seminar:**  
**[CPE by the Bay:](#)**  
**November 10th & 11th in Foster City**



**PREPARING & DEFENDING TAX RETURNS FOR THE LEGAL MARIJUANA INDUSTRY:**

**Friday**  
**Dec 9, 2016**  
**7:00 AM - 5:00 PM**

The legal marijuana industry finds itself in a very unique tax limbo - while the sale of marijuana is legal (but regulated) in many states, marijuana remains a Schedule I narcotic under federal law. As such, the preparation of tax returns for industry businesses is governed by Internal Revenue Code Section 280E and a number of court cases. Spend the day with us and acquire the tools you need to protect yourself, your practice and your clients.

[Registration link](#)

**LOCATION:**  
**Crowne Plaza**  
**5321 Date Avenue**  
**Sacramento, CA 95841**

### MSEA Update Seminars



#### [ClientWhys 1040 Review & Update](#)

**November 16, 2016**  
Holiday Inn Silicon Valley  
1350 N. 1st Street  
San Jose, CA 95112



#### [Cast In Concrete](#)

**January 5, 2017**

**Marianis Inn & Restaurant**  
Santa Clara, CA

Mission Society of Enrolled Agents, 2021 The Alameda, Suite 280, San Jose, CA 95126

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