



Mission Society of Enrolled Agents Newsletter October 2016 Edition

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MSEA COMMITTEE MEETINGS

**EDUCATION:
October 6th**

Agenda:

**SEE Bootcamp
2017 Education Topics
Monthly Speakers**

Public Info & Awareness

**Upcoming event:
TAX HELP DAY**

Mission Society of Enrolled Agents

What Can this Membership do for Me?

Dearest Membership,

Attending the next California Society of Enrolled Agents board meeting can broaden your horizons as to what this association can really do for you, and what you can do for your association! MSEA's very own Ms Torie Charvez can attest to that! Ms Charvez expanded her leadership roles with CSEA/MSEA after attending her first state board meeting.

Ms. Charvez has become a well-respected instructor throughout the nation due to the abilities she's demonstrated as a Leader. She has since evolved to higher ranks within the Society, including CSEA's 1st Vice President (2015/16 & 2016/17) while holding down the fort as Treasurer for MSEA this term.

Like most new members of Mission Society, Ms Charvez had only *heard* of the ongoing efforts the National Assn of Enrolled Agents and CSEA produced. The leadership efforts put forth by all levels of membership is what makes this association work so well. It has worked so well Enrolled Agents have managed to expand on an international level.

For the past 15 years CSEA has assisted the Japanese Society of Enrolled Agents (JSEA), a sister chapter, in obtaining educational requirements for renewing their EA credentials. Ms Charvez was honored to accept, for the second time, the task of flying to Japan to deliver such training to these students!

"What an experience! JSEA are small in numbers, but are mighty and strong in dedication! It was amazing, rewarding and added another layer of enjoyment for me as an instructor. Our JSEA counterparts received Ethics, 2015 Hot topics, Review of Schedule A-C-E, Dealing with IRS correspondence as well as hands on 1040NR forms and sale of a foreign rental property on form 4797. We ended with an impromptu co-teaching on sales

[Committee Calendar](#)

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

[STALM-](#)
October 21st

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

October 22nd & 23rd



National Assn of Enrolled Agents

[Member Get a Member Campaign](#)

[NTPI Orlando](#)

tax vs. value added taxes and how they may or may not be reported on Schedule C.", Ms. Charvez shared.

Like many members, we may not truly understand what this membership can bring until we apply ourselves! Ms Charvez is a great testimony of success on all levels of this association!

October 22nd and 23rd CSEA's Board and Committee meetings will be held in Sacramento. Members, Directors, and Committee Chairs are encouraged to attend and learn about the ongoing programs. This participation will connect you with other chapters throughout the state, build relationships, and broaden your horizons as to what this association can really do for you!

Regards,
Editor

MSEA Educational Offerings...



[Monthly Luncheon](#)

October 25, 2016 11:30-2:10pm
Speaker: *Richard Ogg, EA, CFS, NSSA*
Social Security for Tax Advisors*

Objectives:

- * Ease client concerns about a potential demise of the Social Security system.
- * Explain to clients how potential Social Security benefits are determined.
- * Alert clients to potential benefits they may be missing.
- * Impress upon their clients the need to get expert help if their situation is divergent from the simplest situations.
- * Provide clients with an optimum plan for taking Social Security benefits given basic assumptions by their client and assuming their client's situation fits the simplest scenario.

*This course does not qualify for Federal CE credit.

Special Enrollment Exam Boot Camp: October 29th, Nov 5th & 19th

What:

Three full days of intensive review for preparation of all three parts of the Special Enrollment Exam (SEE)

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!

[Continuing Education](#)

[Find An Enrolled Agent](#)



California Society of Enrolled Agents
Mission Chapter

Join Our List

Join Our Mailing List!



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2021 The Alameda,
Suite 280
San Jose, CA 95126

Contact: office@missioneas.org if interested

MSEA & Local Chapter Educational Offerings...



**Golden Gate Society of Enrolled Agents
Member Meeting
Thursday October 20, 2016**

- 6:00 to 6:45 PM - Social Period
- Dinner is served at 6:45 PM
- 7:30 to 8:30 PM - Educational Program
"Overview of Federal Tax Procedures and Working with Taxpayers Facing the Fraud" Penalty"
Speaker: Steven Walker, LLM, JD, BS



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

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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