

# Colorado Society of Enrolled Agents

Volume 18 Issue 4  
July / August, 2006

## MEETINGS

Everyone welcome - Members, spouses, friends, non-members, subscribers, IRS & CDOR personnel, and any other interested individuals!!



Your Board wants to see you!!! This month and in future months at our regularly scheduled dinner meetings. They are one of the best places to meet new members, share your ideas, learn new resources, and actually have fun while earning CPE credits.

Reservations may be called to Jack Rogers at 303-708-8078 or e-mail to [taxprepJR@msn.com](mailto:taxprepJR@msn.com) no later than the Thursday before the meeting at 5:00 p.m. No shows will be billed for cost of the meal if a reservation is made.

## DINNER MEETINGS

### JULY 2006

#### Board Meeting

**Date:** Tuesday, July 25, 2006

**Time:** 5:30 PM Board Meeting  
6:00 PM Dinner  
7:00 PM Program

**Place:** Holiday Inn  
4849 Bannock St.  
at I-25 and I-70  
*Directions on page 7*

**Program:** **Buying & Selling Accounting Practices**

**Speaker:** **Rick Harrison CPA, MBA**  
*ProHorizons*

### AUGUST 2006

#### Board Meeting

**Date:** Tuesday, August 22, 2006

**Time:** 5:30 PM Board Meeting  
6:00 PM Dinner  
7:00 PM Program

**Place:** Holiday Inn  
4849 Bannock St.  
at I-25 and I-70  
*Directions on page 7*

**Program:** **412 (i) Defined Benefit Plans**

**Speaker:** **Benita Creacy, CFP**  
*DC & Associates, Inc.*  
**Financial Solutions Program**

#### Cost for Dinner & Program:

Members .....	\$20.00
Non-members .....	\$25.00
Program Only .....	\$10.00



*“Let’s Feast Together”*

## PRESIDENT’S MESSAGE

**W**ell I hope you all enjoy your summer and I will see you at the July meeting and will be giving you a short update on the SEE at that time. Hi to all.

I hope that your summer has been less busy then mine has. First at the end of April I attended the Presidents roundtable meeting in Washington DC. What a treat that was to meet other Presidents from around the country and exchange ideas for the organization.

Then the first week in May I went back to Baltimore and attend the SEE questions writing workshop. There was supposed to have been over 30 people to write the 1200 questions and ended up with only twenty in attendance. We worked non-stop on the question writing and it was a lot of work. We were even served our breakfast and lunch in the room to keep us going. I will never forget an experience.

Upon return from the Presidents round table I left Clergy Financial and I am focusing on my own business that was started about 18 months ago. I never expected to be so busy right away.

OK now on to the rest of the story. The SEE exam is scheduled to be given some time in October this year. With the exam being outsourced, we will not be able to do the donuts and coffee as we have in the past. Participants will be given the test in parts and can take the test over a 6 or 8 week period (this has not been decided yet). If they fail a part, they can not retake that part until the next testing cycle. This cycle that has been proposed is once every quarter for 6 or 8 weeks. There is still a lot of work the IRS needs to do to firm up the testing requirements. My understanding is that the participant will sign up on line for the time and place convenient for them. Sure is a change from when we took it.

The first group will not have immediate results on the pass or fail grade. This first set will be setting the parameters for the grading for the rest for the test takers.

God Bless

Jo Ann

- CoSEA meetings are held the fourth Tuesday of most months (unless otherwise announced) and include a dinner and an educational presentation. One (1) CEU is awarded for each attendance based on those presentation. Cost for the dinner/presentation for members is \$20; for non-members, it is \$25. We usually meet 10 months of the year; normally there is no meeting in March and our September meeting has been held in Fort Collins or Loveland for the past few year. We plan an annual Christmas get-together at the December meeting.
- If you are particularly qualified in a specific tax area and would like to be a presenter in that area at one of the meetings, please Indicate Yes  and list your particular area of expertise on the front of the application. A nominal honorarium is provided each presenter.
- Your name will be added to our bi-monthly newsletter distribution list.
- This page is for your information and should not be returned with your application for membership. Membership application can be found elsewhere in the newsletter.

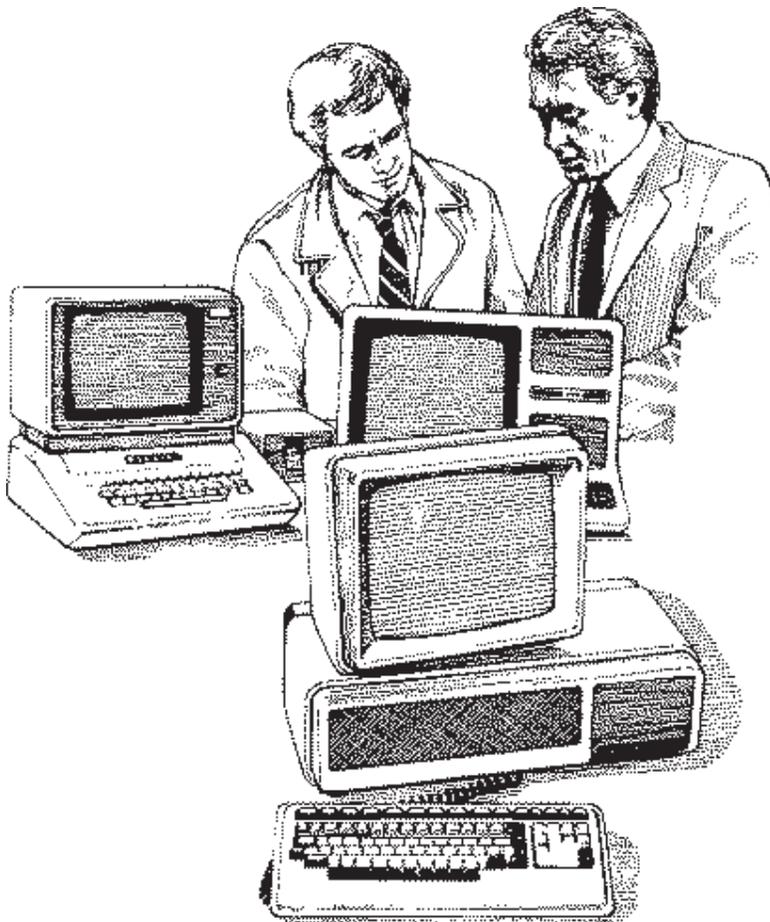
## *Mike's Musings & Other Stuff*

**H**ere we are, half-way through the year. Can we relax? No not really. It is time to renew your software, take advantage of the low prices on supplies and to think about upgrading the equipment. It beats playing FREECELL all day.

I didn't make it to Las Vegas for the Super Seminar, so I guess I am back in the hunt for my CPE's again this year. There are a lot of choices, but I think I will try to get to the local ones instead of going out of state. It is fun going but it does get expensive at times.

I am glad to see that IRS got things worked out on the SEE Exam. I know that there will be 3 parts instead of 4. There will be conditional carry forward of parts previously passed. The test will be taken on the computer at testing sites, and can be taken at different times. There will be approximately 100 questions for each part. COSEA will be getting together the material needed for our classes. More information will be forthcoming as soon as we know more.

Deanna and Hubby are proud parents.



***“Knowledge,  
Education  
CPE”***



**Get ready for the meeting**

## ***FROM JACK***

I need members to update me with email addresses. If you can, publish the following failed email addresses' which I have had to remove. If these belong to anyone who wants to be on our email broadcast list, ask them to email me with their corrected email address. The email addresses I've had to drop as undeliverable are:

toddggi@wispertel.net  
 rjkaff@worldnet.att.net  
 nskorski@aol.com  
 wheelkim@aol.com  
 andypan@aol.com  
 lwells9041@aol.com  
 billmorlongea@aol.com  
 ksomers@3rivers.net  
 mildred28@aol.com  
 lanacal@aol.com  
 taxwrk@aol.com  
 gabianchi@aol.com  
 accacc@aol.com  
 johnken@ken-beck.com  
 cspaeth@vailbooks.com

Thanks,  
 Jack

## **A LITTLE BIT OF HUMOR**

### **FOXY LADY:**

Sexy, fashion-conscious blue-haired beauty, 80's, slim, 5'4" (used to be 5'6"), searching for sharp-looking, sharp-dressing companion. Matching white shoes and belt a plus.

### **LONG-TERM COMMITMENT:**

Recent widow who has just buried fourth husband, and am looking for someone to round out a six-unit plot. Dizziness, fainting, shortness of breath not a problem.

### **SERENITY NOW:**

I am into solitude, long walks, sunrises, the ocean, yoga and meditation. If you are the silent type, let's get together, take our hearing aids out and enjoy quiet times.

### **WINNING SMILE:**

Active grandmother with original teeth seeking a dedicated flosser to share rare steaks, corn on the cob and caramel candy.

### **BEATLES OR STONES?**

I still like to rock, still like to cruise in my Camaro on Saturday nights and still like to play the guitar. If you were a groovy chick, or are now a groovy hen, let's get together and listen to my eight-track tapes.

### **MEMORIES:**

I can usually remember Monday through Thursday. If you can remember Friday, Saturday and Sunday, let's put our two heads together.

### **IN MINT CONDITION:**

Male, 1929, high mileage, good condition, some hair, many new parts including hip, knee, cornea, valves. Isn't in running condition, but walks well.

**Colorado Society of Enrolled Agents**

P.O. Box 2707  
Edwards, CO 81632

**APPLICATION FOR MEMBERSHIP**

Name \_\_\_\_\_ Mr/Mrs/Ms

Business Name \_\_\_\_\_

Address \_\_\_\_\_

Business \_\_\_\_\_ Residence \_\_\_\_\_

Enrolled Agent? Yes\_\_\_ No\_\_\_ Registration Card No. \_\_\_\_\_

Business/Home Phone Number ( ) \_\_\_\_\_

Business/Home email address \_\_\_\_\_

Do you want to be added to the CoSea e-mail alert list? Yes\_\_\_\_\_ No \_\_\_\_\_

NAEA membership is not required for CoSEA membership, however, if you are an NAEA member, the dues for CoSEA may have been paid at the time you paid your NAEA dues. If so, those dues and your EA data were automatically forwarded to CoSEA; a separate membership application is not required.

Annual membership dues for CoSEA are \$35, the first of which is payable with the application.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**IT'S NOT TOO EARLY TO  
PLAN FOR THE CoSEA HOLIDAY PARTY!**

**Good Times  
Good Friends  
Good Food**

**Check the future newsletter for more details**

## Coming Events



**“Get  
Ready  
To  
Learn”**

<b>July 25, 2006</b>	<b>Rick Harrison</b> <i>Buying &amp; Selling Accounting Practices</i>
<b>August 22, 2006</b>	<b>Benita Creacy, CFP</b> <i>412(i) Defined Benefit Plan</i>
<b>September 26, 2006</b>	<b>Meeting at Johnson’s Corner</b> <i>Ethics - 2 hours CPE</i>
<b>October 24, 2006</b>	<b>Deborah Rodgers</b> <i>IRS Tax Update</i>
<b>November 14, 2006</b>	<b>Deanna Hoffman</b> <i>Colorado Update</i>
<b>December, 2006</b>	<b>Holiday Party</b>
<b>ALREADY PLANNING 2007</b>	
<b>January 23, 2007</b>	<b>TBA</b>
<b>February 27, 2007</b>	<b>Stephen Potter</b> <b>Social Security Admin.</b>
<b>March 2007</b>	<b>NO MONTHLY MEETING</b>

Visit our website at  
**[www.taxpro.org](http://www.taxpro.org)**

### ADVERTISING RATES

Full Page	\$138.00
Half Page Horizontal	\$ 78.00
Half Page Vertical	\$ 78.00
Quarter Page	\$ 44.00
Eighth Page	\$ 26.00
Column Inch	\$ 18.00

Classified ad rates are \$1.75 per line (or partial line) per issue, with a \$10.00 minimum.

Rates apply to CAMERA-READY POSITIVE COPY ONLY Open rates are subject to change, and open rate advertising is subject to space availability. For further information, call Mike Lipnick, EA 303-341-4958.

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We normally print approximately 300 issues bimonthly, with some additional mailings to 400 or more. The newsletter is sent bimonthly to all members of the Colorado Society of Enrolled Agents, nonmember subscribers, selected members of the National Association of Enrolled Agents, government officials, and others. Additional mailings are targeted to other Enrolled Agents and/or other tax professionals.

Deadline is the 15th of the month prior to cover date (i.e. June 15 for July-August issue). Submit copy to L. Michael Lipnick, EA, CoSEA Editor, 1009 S. Newark St., Aurora, CO 80012. Submit contracts and/or payments to L. Michael Lipnick, EA, 1009 S. Newark St., Aurora, CO 80012. Make checks payable to CoSEA.

Published bimonthly by  
**COLORADO SOCIETY OF ENROLLED AGENTS**

Affiliate of National Association of Enrolled Agents

[www.taxpro.org](http://www.taxpro.org)

### MEETING LOCATION

by Mildred A. Cassai, EA

Our meeting site is at the Holiday Inn at the Mousetrap. The address is 4849 Bannock Street, located northwest of the intersection of I-25 and I-70. Here’s how to get there:

*Going east on I-70:* exit onto Pecos, go left (north) over the freeway to 48th Ave. Go right (east) to Bannock, turn left to 4849 Bannock.

*Going west on I-70:* exit onto Pecos, turn right (north) to 48th, turn right (east) to Bannock, go left.

*From I-25:* exit at 58th Ave., go west to 2nd light west of freeway, at Bannock, turn left (south).

## COLORADO SOCIETY OF ENROLLED AGENTS

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The Colorado Enrolled Agent is published bimonthly by the Colorado Society of Enrolled Agents. Your comments, suggestions, and submissions are invited copy must be typed and double-spaced on 8-1/2 x 11" white bond paper with 1-1/2" margins or submitted in WordPerfect on a 3-1/2" diskette. Copy not received by the fifteenth of the month preceding publication will be held for a future issue. We reserve the right to edit all copy for length and clarity. Material published in The Colorado Enrolled Agent may be reprinted. We request only that suitable credit be given. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is published with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional service. If legal or accounting or other expert assistance is required, the services of a competent professional should be sought.

Enrolled Agents  
Federally Recognized Tax Professionals



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