

# Colorado Society of Enrolled Agents

Volume 18 Issue 6  
November / December, 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

### NOVEMBER 2006

#### Board Meeting

**Date:** Tuesday, November 26, 2006

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

**Place:** Holiday Inn  
4849 Bannock St.  
at I-25 and I-70  
*Directions on page 2*

**Program:** Colorado Updates

**Speaker:** TBA

### DECEMBER 2006

#### No Meeting

## HOLIDAY PARTY

The party will be December 6, 2006 at the  
Country Dinner Playhouse.

Tickets are \$32.95 each.

CONTACT LINDA WARD FOR TICKETS.  
303-221-6691. 877-220-2607 toll free,  
303-689-9434 fax  
[linda@lward.biz](mailto:linda@lward.biz) [www.lward.biz](http://www.lward.biz)

#### Cost for Dinner & Program:

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



## PRESIDENT'S MESSAGE

No President's Letter

### 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 1-25 and 1-70. Here's how to get there:

*Going east on 1-70:* 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 1-70:* exit onto Pecos, turn right (north) to 48th, turn right (east) to Bannock, go left.

*From 1-25:* exit at 58th Ave., go west to 2nd light west of freeway, at Bannock, turn left (south).

## SAVE THE DATE! – DECEMBER 6, 2006

Join your fellow EAs at the Country Dinner Playhouse to see **PHANTOM**.

Buffet starts at 6 pm Barnstormers at 7:15 Performance starting at 7:45  
Tickets are \$32.95 per person. Reserve your seats now.

AND don't forget your spouse, significant other, family and friends.

Tax season is just around the corner. So come have some good food and enjoy a sensational show.

Make your check payable to the CoSEA and mail to:

Linda Ward, EA  
Program Director  
7600 East Arapahoe Road Suite 310  
Centennial, CO 80112

## *Mike's Musings & Other Stuff*

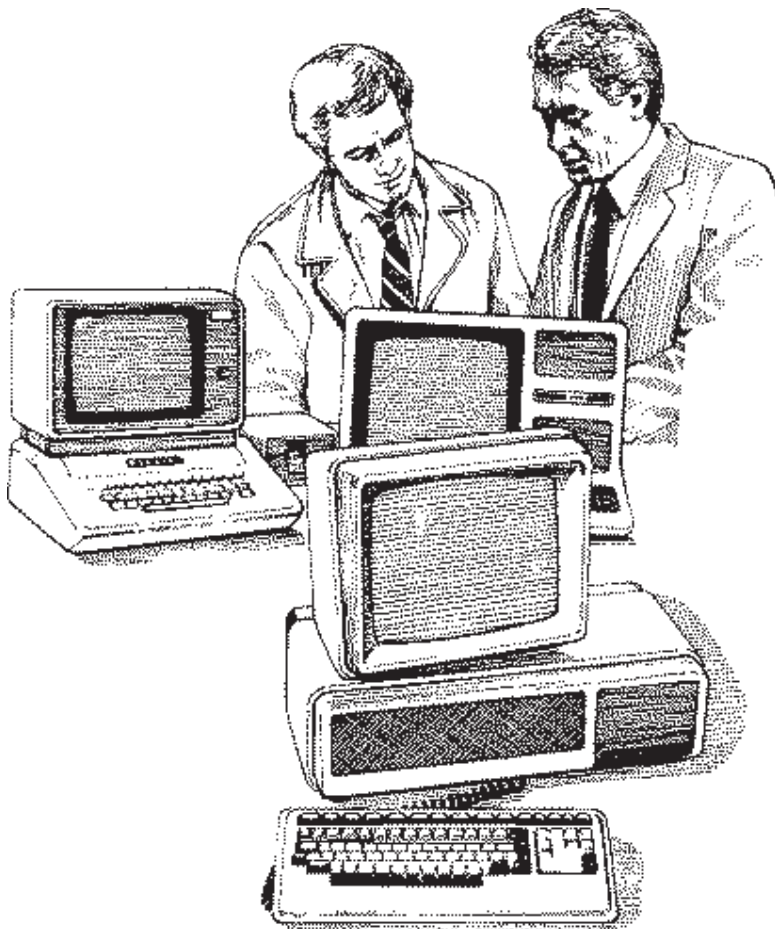
*BIGMIGUEL@AOL.COM*

This might come as a shock to some of you out there. NAEA has informed JoAnn that we can no longer have Colorado Members only. All members will have to belong to NAEA before they can belong to COSEA. All members that are currently Colorado Only Members will have until their membership expires to join both societies. There will no longer be a Colorado application in the Newsletter.

The Tax Book and Quickfinders will be for sale again this year. We have information on both of these books in this newsletter. See Paul Matonis to place your order.

The September Meeting at Johnson's Corners was a success. We had a good turnout and an informative presentation on "Ethics".

The elections for new Officers and Directors will be held at the November Meeting. Those not running for re-election are: Bill Tate and Jack



## *“Get Your Updates”*



Get ready for the meeting

# Quickfinder Ordering Information

We will be offering the Quickfinder Handbooks at a reduced price again for the upcoming 2006 tax year. Again they have added some new products. Use the enclosed flyer with our Society's discount code **Q535** to get the Assoc. discount price for products that you order on your own. We will only do a bulk order for the following tax preparation products. The 1040, Small Business and All States Books or CDs. Packages QF-X for individuals & businesses, the Tax Tables for individuals & businesses plus new this year the Federal Tax Handbook

All Quickfinder products have a shipping & handling charge plus 6.7% sale tax. So each product's quoted price will include S&H plus sales tax. The 1040 Quickfinder Handbook or CD Rom & the Small Business Handbook or CD Rom will cost **\$37.50 each**. The All States Handbook or CD Rom is a stand alone when it comes to qualifying for a bulk discount. I will assume we will order between 2 & 10 copies so that is the price I will quote. The All States Book or CD will cost **\$73.75 each**. The Packages QF-X for individuals or businesses and the Tax Tables for individuals or businesses in **\$12.80 each**. Note there is a separate QF-X for individuals and businesses and a separate Tax Tables for individuals and businesses. New for 2006 is the Federal Tax Handbook it will cost **\$52.25 each**.

Paul Matonis is handling all the details and your order needs to be received by Paul by **Friday December 1, 2006**. To save the cost of a stamp you can give Paul the check at either the September, October or November monthly dinner meetings. The preferred method of picking up your Quickfinder products is from Paul at our January Monthly Dinner Meeting. He will be happy to mail you the products. The additional postage from his office to yours is listed below.

Here's how to order. Make your check payable to **CoSEA**, specify The 1040 Book or CD and the Small Business Book or CD cost **\$37.50 each**. The All States book or CD cost **\$73.75 each**. The Packages QF-X for individuals or businesses and the Tax Tables for individuals or businesses cost **\$12.80 each**. The Federal Tax Handbook cost **\$52.25 each**. If you want Paul to mail them to you include the additional postage of \$10 for one book or Package QF-X, \$11 for two, \$12 for three etc. Additional postage is \$1 per CD Rom and \$2 per Tax Tables. Mail your check to Paul Matonis, 1318 S. College Ave., Fort Collins, CO 80524-4174. Make sure to include your mailing address if you want him to mail it to you. If you have any questions call Paul at 970-416-1656 ext. 4, fax 970-221-3254 or e-mail PMatonisEA@Comcast.Net.

You can also order the Quickfinders directly from them using the special order form with our **"Q535-Colorado Society of Enrolled Agents"** discount code. The prices will be different depending on the quantity. There are quite a few changes from last year so feel free to call Paul if you want further clarification.

**Colorado Society of Enrolled Agents  
DISCOUNT CODE: Q535**

Your association receives a donation for each product purchased under this special discount code—and you receive a discounted price on every product! Prices and donation amounts are listed on order form.

**QUICKFINDER HANDBOOKS**

**1040 Quickfinder Handbook**

The Original Quickfinder! Covers all aspects of preparing a 1040 return. FREE— Personal Income Tax Organizer and Deduction Finder!

**Small Business Quickfinder Handbook**

The first-stop resource for preparing tax returns for every type of small business—partnerships and corporations—plus estate, trusts and tax-exempt organizations. Forms 1065, 1120, 1120S, 1041, 706, 709, 990.

**All States Quickfinder Handbook**

Complete summary of each state's part-year and nonresident instructions for individual tax returns, with over 500 pages of easy-to-find tabs—eliminates hours spent downloading out-of-state instructions online!

**Accounting and Bookkeeping Quickfinder Handbook**

Designed for tax professionals! Create the accounting records needed to prepare tax returns and conquer clients' accounting challenges.

**Depreciation Quickfinder Handbook**

The only guide you need to deal with depreciation—quick answers to all your depreciation and business property questions. If you have business clients, we'll save you time and headaches!

**Tax Planning for Businesses Quickfinder Handbook**

Stay up to speed on new business tax saving strategies and leverage changing tax rules to your clients' advantage with this new Handbook! Tax planning tips will save tax dollars at every stage of a business operation.

**Tax Planning for Individuals Quickfinder Handbook**

Income, estate and gift tax *planning* for individuals, with strategies to reduce individual clients' federal tax burdens. Tables, charts, examples, 1040 Tax Planning Roadmap!

**OTHER QUICKFINDER PRODUCTS**

**Package QF-X for Individual Returns**

**Package QF-X for Business Returns**

More than 300 pages each of logically organized IRS forms and instructions, spiral bound for easy copying. Tabs are also provided for ease of use.

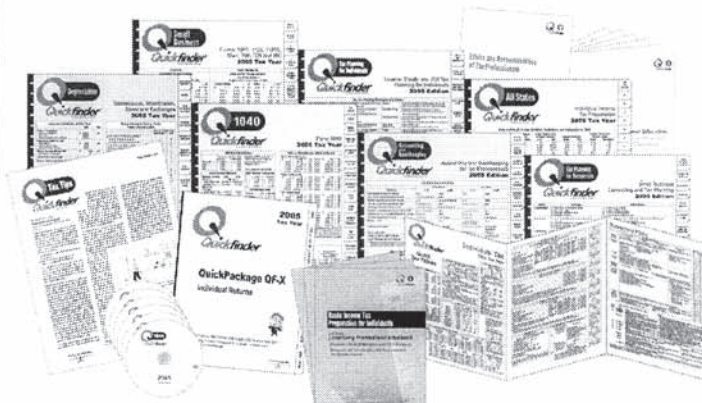
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A monthly newsletter full of fast, accurate tax and financial planning information. Includes briefings of important tax developments, practice management tips, and Q&As based on actual customer questions.

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**Tax Practice Management (DMAT)**

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Learn proven best practices to operate, expand and market a successful tax practice. An essential course for independent tax business owners who want to open a new tax office or expand an existing one. Learn proven strategies and tactics to attract new clients and retain existing clients.

**Income Tax Training Courses**

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For more CPE information, including complete course descriptions, learning objectives, and NASBA disclosure, call 800-510-8997 or visit [Quickfinder.com/cpe](http://Quickfinder.com/cpe).

**RIA Federal Tax Handbook, 2007 Edition**

The RIA Federal Tax Handbook is the most authoritative, accurate and easy-to-use paperback reference for day-to-day tax questions on 2006 and 2007 taxes. The 2007 edition of this essential tool is the most extensive ever—containing answers to hundreds of tax questions plus guidance on the latest tax topics and changes.

**ORDER INSTRUCTIONS**

Be sure to use your association discount code on every order to receive discounted prices plus a donation to your association!

- See association order form for pricing, discount amounts per product, s&h, sales tax, and more. Need an order form? Download a printable form at [Quickfinder.com/PLP](http://Quickfinder.com/PLP), or call 800-510-8997 to have an order form faxed or mailed to you.

- Orders must be placed by phone, mail or fax—online orders do not qualify.

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Order by mail: Quickfinder, 36786 Treasury Center, Chicago IL 60694-6700

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 Month Year Cardholder's Signature

Please Note: Our policy is to charge your credit card at the time of order

Quickfinder Shipping Rates	1 unit	2 – 10 units	11 – 20 units	21+ units
<b>All Handbooks</b> (excludes Federal Tax Handbook)	\$4	\$4 each	For quantities greater than 11, call for shipping/handling pricing	
<b>Federal Tax Handbook</b>	\$5 each for quantities of 1-40. Call for pricing on quantities greater than 40.			
<b>Tax Tips Newsletter</b>	\$4 per subscription			
<b>Package QF-X</b>	\$3 each:			
<b>Laminated Tax Tables</b>				
<b>CD &amp; CPE</b>	\$3 each:			

**ORDER INSTRUCTIONS**

Be sure to use your association discount code on every order! Orders must be placed by phone, mail or fax—online orders do not qualify.

- Order by phone: 800-510-8997, option 1
- Order by fax: 817-877-3694
- Order by mail: Quickfinder  
36786 Treasury Center,  
Chicago IL 60694-6700

**NEW! Increased Donation Amount**

Every Quickfinder purchase you make earns money for your association! See donation amounts listed below!

**SOCIETY DISCOUNT CODE  
Q535**

Product	Qty	Reg.	Assoc.	Donation
<b>Quickfinder Handbooks (Print or CD):</b>				
Tax Planning for Individuals • 1040	1	\$43	\$40	\$5.00 ea
	2 – 10	\$41	\$38	
Tax Planning for Businesses • Small Business • Depreciation • Accounting and Bookkeeping	11 – 20	\$38	\$35	
	21+	\$36	\$33	
<b>All States Quickfinder Handbook (Print or CD)</b>	1	\$76	\$71	\$5.00 ea
	2 – 10	\$72	\$67	
	11 – 20	\$68	\$63	
	21+	\$63	\$58	
<b>Package QF-X (Individuals or Businesses)</b>	Each	\$10	\$9	\$1.00 ea
<b>Tax Tables (Individuals or Businesses)</b>	Each	\$10	\$9	\$1.00 ea
<b>Quickfinder Tax Tips Newsletter</b>	1 yr/12 iss.	\$49	\$45	\$5.00 ea
<b>Handbook-Based Self-Study CPE</b>	Per course	\$22	\$19	\$2.00 ea
<b>Ethics Self-Study CPE</b>	Per course	\$22	\$19	\$2.00 ea
<b>Tax Practice Management CPE (4MDT)</b>	Per course	\$199	\$179	\$5.00 ea
<b>Tax Training CPE (DBIT, DCIT, DBTT)</b>	Per course	\$99	\$89	\$5.00 ea
<b>Federal Tax Handbook</b>	1-40	\$64.75	\$43.85	\$5.00 ea

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**Quantity Discounts:** Combine quantities of Tax Png. for Individuals, 1040, Tax Png. for Businesses, Small Business, and Depreciation when determining the unit price of each Handbook. (e.g., if ordering seven 1040 and five Small Business, the unit price is \$35 each.)

**CD Discount:** 20% off each CD when purchased with the print version (e.g., 20% off three 1040 CDs when purchased at the same time as three print 1040 Handbooks).

**S&H and Sales Tax:** Applicable state and local sales tax and shipping and handling charges will be added at time of order.



**Questions about ordering? Call us toll-free at 800-510-8997!**

FOB Shipping Point



# The TaxBooks - by Tax Materials, Inc.

This is the competition to the Quickfinder handbooks. In fact these are the tax preparer professionals that use to write the Quickfinders. They all jumped ship together and started their own company. They are offering our Society a \$5.00 per book rebate to help us with the cost of our educational programs. This is their second year and they are only offering 3 types of handbooks for the 2006 tax season. The 1040 Edition, the Deluxe Edition which is a combination of the 1040 and the Small Business handbook and an All States Edition. I have only had limited time to compare their books to Quickfinders and it looks like a very similar product. We will do a bulk order for these editions. Note, we will not do a bulk order on the CPE Self Study Courses. Use the enclosed flyer if you want to place an order on your own and please use our **mail code** #265 so that our Society will receive credit for your purchase.

The 1040 Edition is \$32 plus shipping and handling for a total cost of **\$35 each**. The Deluxe Edition which is the combination 1040 & Small Business is \$53 plus shipping and handling for a total cost of **\$56 each**. The All State Edition is \$63 plus shipping and handling for a total cost of **\$66 each**. They also offer these 3 books on a CD Rom with Website updates. The cost for the 1040 Edition CD is **\$32** the Deluxe Edition CD is **\$53** and the All State Edition CD is **\$63**.

**New this year is a Fast Tax Facts that cost \$13.**

The preferred method of picking up your copies of The TaxBooks, CDs or Fast Tax Facts is from Paul at our January Monthly Dinner Meeting. He will be happy to mail you the books, CDs or Fast Tax Facts. The additional postage from his office to yours is listed below.

Here's how to order. Make your check payable to **CoSEA**, specify The 1040 Edition book which cost **\$35 each**, **CD edition is \$32 each**. The Deluxe Edition book which cost **\$56 each**, **CD edition is \$53 each**. Or the All States Edition book which cost **\$66 each**, **CD edition is \$63 each**. If you want Paul to mail them to you include the additional postage of \$10 for one book, \$11 for two, \$12 for three etc. Additional postage for the CDs is \$1.00 each and the Fast Tax Facts is \$2.00 each. Mail your check to Paul Matonis, 1318 S. College Ave., Fort Collins, CO 80524-4174. Make sure to include your mailing address if you want him to mail it to you. If you have any questions call Paul at 970-416-1656 ext. 4, fax 970-221-3254 or e-mail PMatonisEA@Comcast.Net.

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 Find book subtotal in S&H chart below to determine book S&H charge \$

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Book S&H Charge

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## Coming Events



**“Get  
Ready  
To  
Learn”**

**November 14, 2006** TBA  
*Colorado Update*

**December, 2006** Holiday Party

**ALREADY PLANNING 2007**

**January 23, 2007** Audrey Dean  
*IRS, Taypayer Advocate*

**February 27, 2007** Stephen Potter  
*Social Security Admin.*

**March 2007** NO MONTHLY MEETING

Visit our website at  
**www.taxpro.org**

### ADVERTISING RATES

Full Page	\$138.00
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Half Page Vertical	\$ 78.00
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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.

All contents and design are subject to publisher’s approval. Publisher reserves the right to reject or cancel any advertising at any time. Advertiser agrees to indemnify the publisher against any loss, damages or expense arising from the use by advertiser of any authorized names, photograph, sketch or words protected by copyright or trademark.

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**  
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**ROBERT TAUER, EA**

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**Vice-President** ... James W. "Bill" Tate, EA ..... (303) 280-9583  
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**Secretary** ..... Janeen Ryan, EA ..... (303) 755-0528  
**Past President** ..... Victoria Bell, EA ..... (303) 708-8077

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 Paul McCoy, EA ..... (303) 426-0739  
 Linda Ward, EA ..... (303) 221-6691  
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### COMMITTEE CHAIRMEN

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 Nominating ..... Lou Choi, EA ..... (303) 937-8000  
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 SEE Prep Course ..... Ron A. Gonnella, EA ..... (303) 477-9055

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.

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**The Colorado Enrolled Agent Editor**  
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