



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 Debbie Lynn at 303-840-8452 or e-mailed to dkl@myedl.com no later than the Sunday before the meeting.

No shows will be billed if a reservation is made.

DINNER MEETINGS

JANUARY 26, 2010

Meeting

Date: Tuesday, January 26, 2010
Time: 5:00 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 10
Program: Employee vs. Independent Contractor
Speaker: Dwight Swaney, PayChex
Entree: Chicken Marsala

FEBRUARY 23, 2010

Meeting

Date: Tuesday, February 23, 2010
Time: 5:00 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 10
Program: General Tax Matters
Speaker: James L. Parke, Esq. of Minor & Brown
Entree: Honey Dijon Salmon

Cost for Dinner & Program:

Members	\$25.00
Non-members	\$30.00
Program Only	\$15.00

MAKE CHECKS PAYABLE TO CoSEA

NO SHOWS WILL BE BILLED!



PRESIDENT'S MESSAGE

As you ramp up for another prosperous tax season, I hope you will consider COSEA a part of your business plan. Networking opportunities, research tools and continuing education are just a few of the benefits we would like to offer. Also please be sure your information is correct on the NAEA and COSEA website so all those potential new clients can find you.

At this year's board planning meeting on December 12th I proposed some ideas about succession planning for leadership at the state level. The National president's meetings have suggested many ideas about state committee involvement and leadership development. We have a dynamic new board for 2010 and would like to get as many of you as possible to join us on committees for this year

Some of the committees that we are strongly developing are:

Membership/Legislative/Programs/Public Awareness/ Website

Do you have an expertise or interest in any of these?? Please see the last page of the newsletter or website (Taxproco.org) for committee chairs. This is an excellent opportunity to see how we work.

The board is always available for your suggestions and comments. Please let us know what we can do to make this a useful organization for you. Contact me at Janeenie2@comcast.net

Hope everyone has a prosperous tax season and Happy New Year!!

Janeen Ryan EA

Janeen Ryan, EA

EA RENEWAL

Enrolled Agents with Social Security numbers ending in 0, 1, 2, or 3 will need to renew enrollment by January 31, 2010. You may do this by completing the Form 8554 (Application for Renewal of Enrollment to Practice Before the Internal Revenue Service), writing a check, and mailing the package to OPR. You may also submit the form (and pay the renewal fee) by using the secure government wide website www.pay.gov.

Would the following people please contact Jeanine at jeaninetaxserv@yahoo.com, 303-432-7428 (office) • 303-619-8900 (cell) with your current e-mail address. In the event you do not have e-mail, please inform us so that we can continue to send a paper copy.

Mary E. Innes

Theodore Schey

David J. Straka

What Interests You? Know a Speaker?

The Program Committee needs your suggestions on topics and speakers. Contact Deborah Lynn at 303-840-8452 or email her at dkl@myedl.com.



Jeanine's Journal

Dear Members and Colleagues:

This issue includes some new year notes from our president Janeen, the meeting and events dates for the new year, and some federal and state updates that I researched (and sometimes directly quoted) from various sources and contributors. Let me know if there are any particular issues or topics that you would like me to research

for the next newsletter. You may e-mail me at jeaninetaxserv@yahoo.com or call 303-432-7428 with any concerns or suggestions.

Our outstanding "No Frills Annual Tax Update" only costs \$175.00 for non-CoSea members and \$125.00 for members. You will notice that the cost includes eight credits of CPE that you can apply toward your annual EA license credits. I really would like to see as many of my CoSEA colleagues at the "No Frills Annual Tax Update" as possible! The dates for the No Frills Seminar are January 9, 2010 in Denver and January 16, 2010 in Colorado Springs. *See details and topics on pages 7 and 8 of the newsletter.*

A non-CoSEA three-day seminar I would love to see CoSEA members at, is the "NCPE's National Taxpayer Representation Education Program For Enrolled Agents and Other Tax Professionals, Level 1" Seminar on June 23-25, 2010. *See details on page 9 of the newsletter.*

Have a great tax season and keep in touch!

Happy New Year!

Sincerely yours,

Jeanine

Jeanine Buben-Croy, MT, EA

Vice-President, Newsletter Editor and Education Chairperson, CoSEA

<http://www.businessstaxcompliance.com> • jeaninetaxserv@yahoo.com

303-432-7428 (office) • 303-619-8900 (cell) • 303-432-2455 (fax)

*"Come
to the
Meetings"*



Have You Updated Your Profile Lately?

The details of your NAEA profile can impact whether you are matched with a potential new client. To update your profile, go to www.naea.org, log in (User name is your NAEA ID and password is your zip code) and click on **"View/Edit My Profile."** You can change your login & password, see financial history, change your specialties and edit you contact information (click on "Edit" at bottom of screen).

There you can change all your contact information and also enter a description of your practice in the "Supplementary Information" tab.

In addition, please check and update your information on the Colorado website, go to www.taxproco.org. Use the same User name and password as for NAEA website.

Please send your updated contact information, *i.e.* addresses, phone numbers and/or e-mails to Richard Van Buren at (303) 660-2295 or email to rmvanb84@aol.com This will help your Board stay current and ensure that all notices, newsletters, etc. will be delivered to you in a timely manner. Please note that your newsletters are e-mailed to you by Joan Lipinski of Misteren Graphics, our printer. This is not spam, so please do not block this e-mail.

As a Board we have been trying to stay on top of all changes submitted but would like your assistance in verifying that everything is correct for you.

FEDERAL TAX UPDATES

E-File Opens for 2009

Source: www.IRS.gov and [IR 2009-5](#).

“This year, the IRS and its partners in the Free File Alliance are offering a new option, Free File Fillable Tax Forms, which allows free electronic filing of tax returns for virtually everyone.

Taxpayers who use e-file and who choose direct deposit can receive their refund in as few as 10 days. That’s because with e-file, there’s no paper return going to the IRS. IRS e-file allows taxpayers to file their returns now and pay later if they owe taxes. It allows taxpayers to file both federal and most state returns at the same time. And with direct deposit, there’s no paper refund going to the taxpayer. So it’s all electronic and much faster than paper.

For more information, see news release [IR 2009-5](#), E-File Opens for 2009 With New Features to Expand Taxpayer Access, Help Speed Refunds.”

Recovery Rebate Credit Available This Year

Source: www.IRS.gov and [Recovery Rebate Credit Information Center](#) page.

The recovery rebate credit is a one-time benefit for people who didn’t receive the full economic stimulus payment last year and whose circumstances may have changed, making them eligible now for some or all of the unpaid portion.

For more information, see the [Recovery Rebate Credit Information Center](#).”

Consumer Alert

Source: www.IRS.gov and [Suspicious e-Mails and Identity Theft](#) page.

“The IRS warns taxpayers to be on the alert for e-mails and phone calls they may receive which claim to come from the IRS or other federal agency and which mention their tax refund or economic stimulus payment. These are almost certainly a scam whose purpose is to obtain personal and financial information — such as name, Social Security number, bank account and credit card or even PIN numbers — from taxpayers which can be used by the scammers to commit identity theft. The e-mails and calls usually state that the IRS needs the information to process a refund or stimulus payment or deposit it into the taxpayer’s bank account. The e-mails often contain links or attachments to what appears to be the IRS Web site or an IRS “refund application form.” However genuine in appearance, these phonies are designed to elicit the information the scammers are looking for.

The IRS does not send taxpayers e-mails about their tax accounts. Additionally, the way to get a tax refund or stimulus payment, or to arrange for a direct deposit, is to file a tax return.

For more information on consumer scams, see [Suspicious e-Mails and Identity Theft](#)”

Sending Correspondence to Your Clients

Source: [NATP Tax Pro Weekly](#), November 19, 2009.

“There has been a bit of controversy over whether it is permissible for tax preparers to send clients holiday or birthday cards without risk of penalty for violating the disclosure and use rules of §7216. NATP contacted the IRS Chief Counsel’s office on this issue and we were assured that sending correspondence to clients via the U.S. Postal Service is in no way a violation of §7216 because there is no unauthorized disclosure. The postal service is merely delivering the mail. The IRS provided NATP with the following information:

- Reg. §301.7216-2(n) permits a tax return preparer to compile and maintain a separate list containing solely the names, addresses, e-mail addresses, and phone numbers of clients for whom the preparer has prepared a tax return. The distribution of information for communications purposes (such as seminar/conference announcements, new hire announcements, seasonal or other greeting cards, modest gifts of nominal value, and newsletters principally related to tax information) is a permissible use of tax return information under Reg. §301.7216-2(n), such that written consents from clients are not required.”

IRS Announces 2010 Standard Mileage Rate

Source: IR-2009-111, Dec. 3, 2009.

“WASHINGTON — The Internal Revenue Service today issued the 2010 optional standard mileage rates used to calculate the deductible costs of operating an automobile for business, charitable, medical or moving purposes.

Beginning on Jan. 1, 2010, the standard mileage rates for the use of a car (also vans, pickups or panel trucks) will be:

- 50 cents per mile for business miles driven
- 16.5 cents per mile driven for medical or moving purposes
- 14 cents per mile driven in service of charitable organizations

The new rates for business, medical and moving purposes are slightly lower than last year's. The mileage rates for 2010 reflect generally lower transportation costs compared to a year ago.

The standard mileage rate for business is based on an annual study of the fixed and variable costs of operating an automobile. The rate for medical and moving purposes is based on the variable costs as determined by the same study. Independent contractor Runzheimer International conducted the study.

A taxpayer may not use the business standard mileage rate for a vehicle after using any depreciation method under the Modified Accelerated Cost Recovery System (MACRS) or after claiming a Section 179 deduction for that vehicle. In addition, the business standard mileage rate cannot be used for any vehicle used for hire or for more than four vehicles used simultaneously.

Taxpayers always have the option of calculating the actual costs of using their vehicle rather than using the standard mileage rates.

[Revenue Procedure 2009-54](#) contains additional details regarding the standard mileage rates.

[Subscribe to IRS Newswire](#)

Page Last Reviewed or Updated: December 03, 2009

STATE TAX UPDATES

New York State Registration Requirements for Tax Preparers

Source: NSA MemberLink, November 11, 2009.

“As many professional tax preparers are aware, the State of New York has enacted a statute requiring preparers to register with the state if they prepare even one return that will be filed in New York. Please note that this registration requirement applies if you are paid to prepare a return; who files the return is immaterial for this purpose.

Further, individuals who are considered “commercial tax return preparers” under the law must not only register but pay a \$100 fee (remember, this provision was included in the New York budget bill this summer). In general, a commercial preparer is an individual who is paid to prepare ten or more New York State tax returns.

The New York State Department of Finance and Taxation has updated its website and will begin accepting registrations electronically beginning on November 16. The website also contains links to more information about this new registration/fee requirement, including a link to TSB-M-09(11)C, (9)I, (10)M, (3)MCTMT, (4)R, (15)S, Tax Preparer Registration Program, prepared by the Department's Tax Guidance Division. The website may be found at the following weblink: <http://www.tax.state.ny.us/tp/tpreg.htm>”

New York Tax Return Preparers: New Registration Rules?

Source: NSA Alert, National Society of Accountants, December 04, 2009.

“As NSA alert readers are aware, a law enacted earlier this year in New York required anyone considered a “tax return preparer” to register with the State and, if the preparer anticipated preparing ten or more New York returns, to both register and pay a \$100 fee. Importantly, the law did not consider an individual a tax return preparer if that individual is:

- a Certified Public Accountant (CPA) or Public Accountant (PA) currently licensed in New York State
- an attorney currently licensed in New York State,
- an employee who is directly supervised by a New York State licensed CPA, PA, or attorney,
- an employee of a business that prepares the returns of that business, or
- a return preparer who is not compensated including volunteer tax preparers

However, legislation introduced in the New York Legislature on December 2, which was considered, approved and sent to the Governor for signature the same day would strike the “currently licensed in New York” requirement so that ANY attorney, CPA or PA is exempt from the registration requirement, no matter the state of licensure. Furthermore, the legislation provides this act shall take effect immediately. The bill is 2009 NYS A 23 v, Part D, Section 3.”

New York – Dept. of Taxation Releases Consumer Guide to Choosing a Tax Preparer

Source: NAEA e-Alert, November 20, 2009.

“In anticipation of the registration of paid tax preparers (see October 23, 2009 *E@lert* for details), the New York State Department of Taxation and Finance released a Consumer Bill of Rights to help disseminate simple guidelines for what a tax preparer should provide to a taxpayer and vice versa. The pamphlet, under a 2008 law, must be provided to consumers by all tax preparers. See the guide [here](#).”

New York Publishes Guide For Hiring A Tax Preparer

Source: NSA Alert, November 20, 2009.

“The New York State Department of Taxation and Finance has published a pamphlet to guide consumers with refund anticipation loans, refund anticipation checks, and hiring tax preparers. The pamphlet also provides contact information for the state tax department and the U.S. Internal Revenue Service, and information on where to file a complaint against a tax preparer.

Under a 2008 law, the pamphlet must be provided to consumers by all tax preparers unless the preparer is an EA or is a CPA or attorney licensed in New York. Preparers can download and print the pamphlet from the weblink below.

The pamphlet cautions consumers to ask for a written estimate of fees before hiring a tax preparer. It recommends that consumers ask preparers whether their returns will be filed electronically, and if the preparers will represent them if they are audited.

The pamphlet says tax preparers should not: ask consumers to sign a blank return, an incomplete return, or a return with false information; prepare returns without reviewing the supporting records and information; guarantee receiving a tax refund; or guarantee that consumers will not be audited.

The pamphlet, Consumer Bill of Rights Regarding Tax Preparers, is available at <http://www.tax.state.ny.us/pdf/publications/income/pub135.pdf>. ”

NAEA has launched the online CPE testing for the EA Journal. The CPE tests are based on the articles in each issue of the EA Journal. With the online tests, your results are immediate! Read the articles, log on and take the test. Go to www.naea.org for all the details.

Attention Members!!

By Paul Matonis, EA

As long as you use our Society codes when ordering Quickfinders and the Taxbook (Quickfinder Q535, and for the TaxBook code 265) then we will get credit for their purchases.

Thank You.

Please contact Paul Matonis EA if you have any questions or concerns about this.

e-mail: PMatonisEA@Comcast.Net

Phone: 970-416-1656 ext 4 • Fax: 970-221-3254 • 1318 S College Ave., Fort Collins, CO 80524



Colorado Society of Enrolled Agents

presents

NO FRILLS TAX SEMINAR

Saturday, January 9, 2010

Holiday Inn
4849 Bannock St., Denver, CO 80216
303-292-9500

Saturday, January 16, 2010

Hilton Garden Inn
1810 Briargate Pkwy., Colorado Springs, CO 80920
719-598-6866

NO FRILLS TAX SEMINARS

are a CPE bargain at

\$125 (members) or
\$175 (non-members)

FOR 8 HOURS CREDIT!

Here's what will be covered at these seminars:

SEMINAR TOPICS

IRS Tax Update

Nuts & Bolts

Ethics

Colorado Tax Update

We have entered into an agreement with the Office of the Director of Practice, Internal Revenue Service to meet the requirements of 0131 Code of regulations 10.6(g). This agreement does not constitute an endorsement by the Director of Practice as to the quality of the program or its contribution to the professional competence of the enrolled individual.

These seminars also meet the requirements of Chapter 6 of the Colorado State Board of Accountancy for continuing education CPEs.

2010 NO FRILLS

MARK YOUR CALENDAR NOW!

January 9, 2010 – Denver
Holiday Inn Denver Central, 4849 Bannock Street

January 16, 2010 – Colorado Springs
Hilton Garden Inn, 1810 Briargate Parkway

SPEAKERS AND TOPICS

Gerry Malmberg and Lynda Sax
with the Internal Revenue Service

IRS Tax Update

Dan Halleman,
retired after 26 years of federal service

Nuts and Bolts

Nick Kellem, Esq., with Joseph H. Thibodeau, P.C.
Ethics

Linda Ward, EA
Colorado Tax Updates

8 hours of CPE – no price increase

\$125.00 for members • \$175.00 for nonmembers

Register by January 5, 2010

Lunch and Breaks Included With Seminars
(Both Places)



Course Fee \$125 members & \$175 non-members - **NO PRICE INCREASE**
Lunch and breaks provided -Denver and Colorado Springs - **Register by January 5, 2010**

Name: _____ Firm: _____

Address: _____

Telephone: (Office) _____ (Home) _____

E-mail Address: _____ Member Non-Member

Check Enclosed: \$ _____ (Payable to Colorado Society of Enrolled Agents) Indicate: Denver _____ Colo. Spgs. _____

Charge Visa/Master Card Card # _____ Expiration Date: _____ Signature: _____

Return registration form with check or charge information to:

CoSEA, to Pennye McFarland, 9249 S. Broadway, #506, Denver, CO 80129 or fax charge information to Pennye at (303) 470-3456 • **For further information please call Pennye McFarland at (720) 470-8317**

Announcements and Activities

Educational Records of CPE and Certificates Required for EAs

Source: “Letter from the Office of Professional Responsibility” at www.nstp.org and Jeanine Buben-Croy, MT, EA, Education Chairperson, CoSEA

Enrolled Agents (EAs) must be aware and make sure that their certificates and logs are documented in their records for the next renewal period. The Office of Professional Responsibility recently wrote a letter to National Society of Tax Professionals (NSTP) reminding EAs of this responsibility. We need to make sure that our members of NSEA/CoSEA adequately keep certificates and logs in our records of our CPE credits. A dedicated folder or notebook for your log and certificates is highly recommended.

Please contact the Education Chairperson of CoSEA, Jeanine Buben-Croy, at jeaninetaxserv@yahoo.com or call 303-432-7428 (office) if you have any questions or concerns about recordkeeping. If you would like Jeanine to send you a log template for chronologically listing your CPE history and ordering your certificates, then please let her know.

NCPE’s National Taxpayer Representation Educational Program For Enrolled Agents and Other Tax Professionals, Level I

Submitted by Ruth Bustamante from PASC Newsletter November-December 2009

The new NCPE’s program aims to increase earning power and practice potential by offering IRS representation services to their clients. Practitioners who do not regularly provide these services benefit greatly from this incomparable practice enhancement opportunity. You will learn the best ways to solve problems caused by the IRS bureaucracy. You gain confidence to protect client rights and rapidly resolve IRS errors.

Per the PASC newsletter article:

1. Obtain skills that meet the needs of your clients.
2. Increase income potential.
3. Resolve returns processing problems quickly.
4. Expand practice clientele and opportunities.
5. Distinguish yourself from ordinary tax preparers.
6. Realize the full use of your EA or CPA credential.

This first of a three level program, Level I, will be held in Denver on June 23-25, 2010. Watch the PASC Newsletter or the PASC Website at www.coloradoaccountant.org for more information as it becomes available. You may also contact Ruth Bustamante at 303-452-8227 or ruth@coloradoaccountant.org. Ruth will also keep CoSEA newsletter editor Jeanine Buben-Croy, MT, EA informed of updates to share with CoSEA members.



“Get
Ready
To
Learn”

Coming Events 2010 PROGRAMS

- March – NO MEETING
- April 27 – Holiday Inn
- May 25 – Holiday Inn
- June 22 – Holiday Inn
- July 27 – SE Denver - Luncheon
- August 24 – Holiday Inn
- September 28 – Ethics, Johnson’s Corner
- October 26 – Colorado Tax Update
Holiday Inn
- November 16 – IRS Tax Update, Holiday Inn
- December – Holiday Party

Special Seminars

2010 No Frills

- January 9, 2010 – Denver
- January 16, 2010 – Colorado Springs

Visit our website at
www.taxproco.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 bimonthly ad rates are \$1.75 per line (or partial line) per issue, with a \$10.00 minimum.

Open rates are subject to change, and open rate advertising is subject to space availability. For further information, call Jeanine Buben-Croy, EA 303-432-7428.

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 unauthorized names, photographs, sketches or words protected by copyright or trademark.

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 Word attachments to jeaninetaxserv@yahoo.com. Submit contracts and/or payments to Jeanine Buben-Croy, EA, 6606 W. 79th Ave., Arvada, CO 80003. Make checks payable to CoSEA.

Published bimonthly by
COLORADO SOCIETY OF ENROLLED AGENTS
Affiliate of the National Association of Enrolled Agents
www.taxproco.org

MONTHLY MEETING LOCATION

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).

If you know of a company or someone who wants to advertise in the Newsletter, please have them contact
Jeanine at
303-432-7428 or e-mail her at jeaninetaxserv@yahoo.com

The 2009 Tax Year Quickfinder - by Thompson PPC

We will be doing a bulk order for only the 4 most popular Quickfinder Tax Handbooks or CD's which are the 1040 Edition, the Small Business Edition, the Premium Edition which is a combination of the 1040 and the Small Business handbook and the All States Edition at a reduced price again for the upcoming 2009 tax year. For the 3rd year in a row there is no price increase. **Due to the complexity of the additional products & the staggered release dates of the other fine books, reference charts, etc that they offer, you will need to order these on your own.**

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 and for our Society to get the rebate credit. New for 2009 is their Social Security & Medicare Quickfinder Handbook. At this time I do not have any other details on this new book.

All 4 of the Quickfinder products we will do a bulk order for 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 Premium Edition combination & 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 Premium Edition which is a combination of the 1040 and the Small Business handbook only no CD Rom cost **\$63.50 each**. The All States Book or CD will cost **\$73.75 each**.

Paul Matonis is handling all the details and your order needs to be received by Paul by **Tuesday December 1, 2009**. 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 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 Premium Edition combination book cost **\$63.50 each**. The All States book or CD cost **\$73.75 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 is \$1 per CD Rom. 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.

Quickfinder®

2009 TAX YEAR PRODUCTS

Colorado Society of Enrolled Agents

Discount Code: **Q535** Customer Number.....(if known.)

Company Name

Name.....

Address.....(If P.O. Box, please include physical address for UPS.)

City, State, Zip

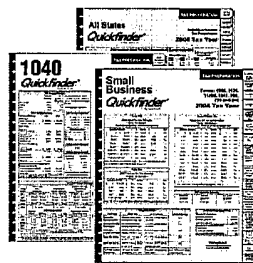
Email

Day Phone (.....)

ORDER INSTRUCTIONS

Use your association discount code (listed above) on every order!

- Phone: 800-510-8997, option 1
- Fax: 817-877-3694
- Mail check to:
Quickfinder
36786 Treasury Center
Chicago IL 60694-6700
- Online: Quickfinder.Thomson.com



Credit Card Account # Visa MasterCard Discover AMEX

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Expiration Date

Month Year Cardholder's Signature _____

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

All Discounts: The highest available discount will be applied to your order; discounts and special offers cannot be combined.

Quantity Discounts: Combined quantities of the SAME TITLE are eligible for a quantity discount (e.g., you buy six 1040 Handbooks and pay \$38 each, instead of \$40 each). Discount *does not apply* when purchasing different titles (e.g., you buy two 1040 Handbooks and three Small Business Handbooks).

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.



FOB Shipping Point



Introducing Social Security and Medicare Quickfinder Handbook

Provides CPAs, enrolled agents and other tax preparers with an affordable, easy-to-use Handbook for quickly and efficiently accessing the information their clients want to know about Social Security, Medicare, Medicaid, and Eldercare insurance.

Quickfinder's Guide to the 2008 and Spring 2009 Tax Acts

Be prepared to answer client questions and save tax dollars! This handbook is packed with all the significant tax acts and legislation passed in 2008 and through the spring of 2009.

Product	Qty	Retail	Assoc.	Shipping
Quickfinder Handbooks (Print or CD): 1040 • Small Business • Individuals— Special Tax Situations • Tax Planning for Individuals • Tax Planning for Businesses • Depreciation • Accounting and Bookkeeping • NEW! Guide to the 2008 & Spring 2009 Tax Acts • NEW! Social Security & Medicare	1	\$43	\$40	\$4.00 ea*
	2 – 10	\$44	\$38	
	11 – 20	\$38	\$35	
	21+	\$36	\$33	
All States Quickfinder Handbook (Print or CD)	1	\$76	\$71	\$4.00 ea*
	2 – 10	\$72	\$67	
	11 – 20	\$68	\$63	
	21+	\$63	\$58	
NEW! Premium Quickfinder Handbook (Available 12/09)	1	\$65	\$63	\$4.00 ea*
	2	\$62	\$61	
	3 – 10	\$60	\$59	
	11 – 20	\$59	\$58	
	21+	\$57	\$56	
NEW! California Tax Quickfinder Handbook	1	\$49	\$47	\$4.00 ea*
	2	\$47	\$46	
	3 – 10	\$44	\$42	
	11 – 20	\$44	\$39	
	21+	\$39	\$36	
NEW! Efficient Tax Office (Print Only)	Each	\$39	\$34	\$4.00 ea
NEW! Quickie Answer Tables (Three to Choose From) • Starting New Business • Employee Benefits • Depreciation	Each	\$9	\$6	\$3.00 ea
Client Quick Reference Tax & Wealth Schedules (Set of 5)	Each	\$12	\$11	\$3.00 ea
Wall Calendar w/ Discount Coupons	Each	\$12	\$9	\$3.00 ea
Package QF-X (Individuals or Businesses)	Each	\$12	\$9	\$3.00 ea
Tax Tables (Individuals or Businesses)	Each	\$12	\$9	\$3.00 ea
Tax Tips Newsletter	1 yr/12 iss.	\$59	\$50	\$4.00 ea
Handbook-Based Self-Study CPE	Per course	\$22	\$19	\$3.00 ea
Ethics Self-Study CPE	Per course	\$22	\$19	\$3.00 ea
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