




President's Message...

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Attachments

fEAst of the EAst
Registration 

PSEA Dinner & Annual
Meeting Reservation 

NAEA's Top Ten Tax Tips 

Well, I hope all of you survived tax season and are on a well-deserved, extended vacation. Sorry about using the work extended, since I'm sure many, if not all, of us have a pile of extensions that need to be completed. So tax season just doesn't go away. I know from talking to other EA's that this tax season seemed to be the tax season from hell. It seems the older I get, the worse it gets. I felt as if I worked harder this tax season than in past years and yet accomplished less. Most returns seemed to take longer than they should have. It was very frustrating. Maybe it has something to do with age. Anyway, another tax season is in the books, for good or ill, so it's time to think about getting our education. Of course that means it's time for the fEAst in the EAst. We were a little late in getting the registration forms out this year. Sorry about that. Hopefully, you have all received the email blast of the registration form. If not, the form is part of this Newsletter and it is also on the PSEA web site. I look forward to seeing all of you in State College on June 23 and 24. I think we have very good topics for you again this year at a price that can't be beat. David and Mary Mellem will again be presenting the majority of the material. And as many of you have requested, Linda Bleil will be teaching us about Forms 1041 and PA 41.

In the last PA EA ALERT, I highly recommended the use of the PSEA web site – www.paenrolledagents.com. I used it a number of times during tax season to link to other useful web sites. Now I would like you to give us your recommendations for improving it. Along those lines, I also want to recommend using the NAEA web site. There are a number of member resources available, including a tax research service that was just rolled out recently. Many of us fail to take advantage of the resources that are available to us that we pay for with our dues.

If you are planning to attend either the Eastern or Western Working Together Seminars, please be sure to sign in as a PSEA member. By doing so, you will be entitled to a \$25 rebate on the cost of the seminar. If you have any questions about the rebate, contact one of the Board members. Our phone numbers and email addresses are on the web site.

Finally, I once again ask for your input regarding the IRS-Practitioner Liaison. If you've encountered any problems or issues with the IRS, please let me know. The goal is to improve the working relationship between the IRS and Practitioner community.

And remember, the next best thing to the education you'll get at fEAst is the opportunity to network with your peers and make new friends. It really is worth the price of admission. Again, I hope to see all of you in State College next month. Until next time...

"We have long had death and taxes as the two standards of inevitability. But there are those who believe that death is the preferable of the two. 'At least,' as one man said, 'there's one advantage about death; it doesn't get worse every time Congress meets.'"

Erwin N. Griswold –
Solicitor General of the
United States 1967-1973

Upcoming Events...

Dates to Remember for 2008

| | |
|--------------------|---|
| May 30, 2008 | Deadline for NTPI Scholarship Applications |
| June 23, 2008 | PSEA Dinner and Annual Meeting, State College, PA |
| June 23-24, 2008 | fEAst of the EAst, State College, PA |
| June 27-29, 2008 | IRS Tax Forum in Anaheim, CA |
| July 11-13, 2008 | IRS Tax Forum in Chicago, IL |
| July 25-27, 2008 | IRS Tax Forum in Atlanta, GA |
| August 1-3, 2008 | IRS Tax Forum in Orlando, FL |
| August 10-13, 2008 | NAEA's 2008 National Tax Practice Institute (NTPI) and 36th Annual Meeting, Baltimore, MD |
| August 22-24, 2008 | IRS Tax Forum in Las Vegas, NV |
| August 29-31, 2008 | IRS Tax Forum in New York, NY |
| September 19, 2008 | Western PA Working Together (save the date) |
| November 8, 2008 | NAEA Board of Directors Meeting, Arlington, VA |

SOUTHEASTERN PA REGION

The next EA Breakfast Meeting is June 4, 2008. Remaining dates are:

| | |
|-----------------------|------------|
| July 2 | August 6 |
| September 3 | October 1 |
| November 5 | December 3 |
| and January 7 in 2009 | |

Please put these dates on your calendar. Future meeting notices will be sent via e-mail only if there is a change or special topic. Meetings are at Michael's Deli and Restaurant of King of Prussia on Town Center Rd in the Valley Forge Center (one mile north of King of Prussia Mall on Rte. 202). Meetings begin about 9 a.m. An RSVP is not needed. Bring your questions, ideas, and experiences to exchange with other EA's. Invite other EA's to the meeting. Any ideas for special meeting topics, or if you wish to be updated on any changes, contact Craig Argo, 610-701-3319 or argotxpro@verizon.net. Sure hope to see you at the meetings.

Announcing....

fEAst of the EAst at the Days Inn in State College, June 23-24, 2008

Registration flyer is attached to this newsletter.

Upcoming Events (cont.)...

Eastern PA Working Together – (this event is closed)

Taking place at Philadelphia University on May 21st, Thomas Wolfe, Secretary of the Pennsylvania Dept. of Revenue will be the keynote speaker. Panel discussions will include:

- Discussion of IRS' Issue Management Resolution System
- Taxpayer Advocate Service Systemic Advocacy System
- Citizens' Taxpayer Advocacy Panel issue tracking system
- Current priorities in IRS exams
- The new Appeals Fast Track Settlement Program
- Automated Underreporter Program
- Correspondence Audits
- Automated Collection System
- Final Circular 230 Regulations
- Revised IRC 6694 Preparer Penalty regime
- Pennsylvania Department of Revenue Issues

Both Bill Matesevac and George Meyers will be attending. Look for reporting on some of these discussions in the August newsletter.

The National Tax Practice Institute™ (NTPI®)

NAEA's National Tax Practice Institute and 36th Annual Meeting will be held August 10–13, 2008, in Baltimore, MD. To book your hotel room at the \$129 rate, call 1-866-837-5182 (tell them you're with the 2008 NTPI Conference) or [visit the website](#). Designed and delivered by enrolled agents, NTPI offers the best representation education anywhere. For those interested in becoming a Fellow, the opportunity is also open for candidates who have completed Levels 1, 2 and 3 in order. Non-fellow candidates are welcome to self-select a curriculum from the classes offered in Levels 1 and 3, or to select an elective. Visit the [NTPI section](#) of the NAEA website to see what's offered. The deadline for scholarships is May 31, 2008. A special session led by OPR director Michael Chesman is scheduled for August 10, primarily focusing on the ethical responsibilities of enrolled agents. Topics will include his concerted efforts to make OPR operations more transparent, §6694 proposed regulations, and contingency fees. Attendees will earn two hours of ethics CPE. There is no fee for this special session, however, a [contribution](#) to NAEA's scholarship fund would be greatly appreciated.

Member News...

We like to hear about career and personal milestones, awards and recognitions. If you're aware of anything that should be reported, please email [Michelle Long](mailto:Michelle.Long).

Editor's Notes...

Included in this newsletter, as an attachment, is the Top Ten Tax Tips courtesy of NAEA, which has provided permission to make copies for use as handouts.

If you've ever wondered about the National Tax Practice Institute and whether it's for you, please take time to read the interview with Dawn Filetti who'll be attending the second level this summer. She welcomes your questions if you're interested in finding out more.

Important! To ensure that this quarterly newsletter won't be rejected as spam, please include pa.enrolledagents.nl@gmail.com in your address book. This email is for distribution purposes only. Several emailed newsletters have bounced back as undeliverable.

If you have news items to submit to the newsletter, ideas for content, or wish to contribute an article, contact me at michelle.long@bmc-llp.com. The deadline for submissions to the August newsletter is July 15, 2008.

If your personal or business information including email address has changed, contact [Samantha Stewart](mailto:Samantha.Stewart) to update your information.

Thank you,

Michelle Long, EA
Editor

The Annual Meeting of the Pennsylvania Society of Enrolled Agents will be held on Monday, June 23, 2008 from 5:30 PM to 7:00 PM. The Meeting will be at the Days Inn, 240 S. Pugh Street, State College, PA 16801.

As was done last year, PSEA is offering dinner, at no charge, to those members who attend the Annual Meeting. However, since we need an exact count, you will need to tell us that you will be attending the Annual Meeting and staying for dinner. You may bring one guest (spouse, significant other, co-worker, etc.) to dinner with you at no charge. Please return the attached reservation form from the attachment link on page 1.

PSEA OFFERS \$25 REBATE

As many of you know, PSEA has been one of the participating practitioner organizations in Working Together in Pennsylvania. Attendance records are kept and any member of PSEA that signs in as a member of PSEA will be sent a rebate check for \$25.

Whenever you attend a Working Together conference don't forget to sign in as a PSEA member. Western PA Working Together takes place September 19th. Save the date until further details become available.

For further information, please contact Bill Matesevac, EA at 724-468-5086 or email wpmatzea@alltel.net.

Member Feature...

One of the goals in providing a newsletter is to become better acquainted with other EAs in the Pennsylvania organization. If you think someone would be a good candidate, please send their contact information to michelle.long@bmc-llp.com.

Dawn Filetti kindly provided the following interview about the National Tax Practice Institute.

Attendance to the National Tax Practice Institute is an opportunity to become well versed in representation skills. The three-year program takes place in Washington DC every August over a weeklong period. Wondering about the benefits of the program, I recently interviewed Dawn Filetti to learn about her experience. Dawn owns and manages a Liberty Tax franchise in Downingtown, PA since 2002. She's been an EA since 1997 and a member of NAEA since 1999. She attended the first level of NTPI for the second time last August.

Her first time around had been two years prior and she found it initially overwhelming, however that first venture resulted in valuable contacts that continue to benefit her. One of those contacts led to the opportunity to be mentored by George Meyers. George has continued to provide guidance as she enters the deeper waters of representation. Other networking relationships that she gained at that initial training have continued to provide the resources she's needed when representing clients.

Dawn was fortunate to be the recipient of a scholarship for a second attendance of level one. The opportunity to get a little more experience helped her understand the representation curriculum more readily and she is now eager to continue with the next two levels. When asked what she would recommend to those interested in finding out more about the benefits of NTPI and client representation, she had the following tips to offer:

- 1) Talk to someone who attended NTPI. This includes Dawn and many on the board.
- 2) Find a mentor who can help you through the representation process.
- 3) Become aware of the increasing need for representation – competent and qualified people are in demand!
- 4) By attending NTPI you get the benefit of a vast networking resource. Dawn found many attendees were prior graduates who were more than happy to share their considerable skills and knowledge.
- 5) Learn more about documenting the representation process, dealing professionally with the IRS and determining what you need to do to help your client. By attending NTPI and gaining valuable contacts, you don't have to reinvent the wheel because there are members who've represented similar cases.
- 6) Most of your efforts go into the research and preparation process, not the representation. NTPI can teach you how to prepare an effective case for your client.

When asked what the best thing is about NTPI, Dawn unhesitatingly says it's the contacts you make and the support system you gain. "The instructors and practitioners you meet are wonderful" is her enthusiastic comment. Dawn welcomes anyone who wishes to contact her with any questions at her office phone - (610-259-0600).

Meet the Board...

Diana C. Dugan, EA currently 1st Vice President of PSEA, has been preparing tax returns since 1986 and has been an EA for 10 years. She started in business as an independent tax preparer and bookkeeper then became business manager for Dennis Stephen Assoc. Ltd. In 1999, she acquired her securities license (7 & 63) in 2003 and then her series 24 in 2004 to qualify as a principal able to supervise financial services provided by registered employees. She currently supervises her own practice in Gilbertsville, PA, providing both tax and financial services. Her practice prepares up to 750 returns a year, also providing bookkeeping, accounting and payroll services. Diana has enjoyed serving on the board since 2004 and currently chairs the website committee. In her spare time she enjoys reading and nature. She finds that the most challenging aspect of the tax profession is meeting the April 15th deadline for clients whose are late getting their information in but still expect a quick turnaround of their tax returns. Diana also says the best thing about being an EA is "the additional knowledge that you accumulate through your relationships that have been built and established".

Ron Calhoun, EA graduated with a Bachelor's degree in Accounting from West Virginia University back in 1969. He served during the Vietnam War as an Army Officer. After being discharged, he became an EA in April 1976. During the seventies and eighties, he worked as a corporate tax accountant for ITT and McCrory Corp. In 1992, he set up his own tax practice in York, PA and became a part time instructor in tax and accounting courses at a local college. Since 2000, he devotes his full time attention to his tax practice called R. Calhoun & Associates, Inc. His company prepares personal and business tax returns, payrolls and payroll taxes, bookkeeping, and tax representation work. Most of the representation work is in the area of collections. Ron is married (39 years) and has three children, Bob who is a chief in the Navy, Pattie who is a Lt Commander in the Coast Guard, and Curren who works in marketing with QVC. He was a past president for New Cumberland River Rescue and currently serves PSEA as a Director on the Board.

Kathryn McCusker, EA received a BA from Penn State University in 1968. She has been in practice since 1983 and an Enrolled Agent since 1991. Her practice is primarily individuals and small businesses in a rural central Pennsylvania area. She is also a Supervisor and Secretary/Treasurer for Chest Township, Cambria County. She is a member of NATP was a charter member of the PA-NATP Board for 10 years, as well as an NAEA member. She has been on the PSEA Board for 8 years, holding the position of Secretary for the past 5 years.

George J. Meyers, EA is the principal of a tax preparation and taxpayer representation firm specializing in audit and appeal representation, as well as tax crisis intervention for individuals and businesses. He is immediate past president of the Pennsylvania Society of Enrolled Agents, and serves on the steering committee of the Working Together Program. George is a member of the National Council for Taxpayer Advocacy, the National Association of Enrolled Agents, and the Pennsylvania Society of Public Accountants (member of the IRS Liaison Committee). He is a Fellow of the National Tax Practice Institute, and the American Academy of Tax Practice. George's life has essentially been devoted to the tax field, finding representation the most challenging aspect of tax practice. His goal is to see EA's get the type of recognition throughout the States that is evident in states like California. He would also like to see new blood getting involved in the leadership of PSEA.

William Matesevac Jr., EA has been an Enrolled Agent since 199 and has been working in the tax and accounting profession since 1972. From 1972 to 1979, he was a sales tax auditor for the PA Department of Revenue. He resides in Delmont, PA with clients mostly in Western PA. Bill has been a member of PSEA since 1991 and a Board member since 1992. He's held every position on the Board except Secretary and is the current President of PSEA and chairs a couple of committees. He majored in accounting at Duquesne University, and years ago took some courses toward a Masters in Taxation. One of his major goals as a Board Member has been to get more PSEA members actively involved and to promote the EA credential.

Helen O' Planick, EA has recently located her practice to a new office in Manchester, PA. Her practice includes taxes, bookkeeping, notary work, and personal financial work. She is also a Series 6 Registered Representative and employs a Series 7 Registered Representative, Registered Investment Advisor and Certified Financial Planner. She has been involved with various seminars, teaching tax practitioners and tax professionals on a variety of topics. She's been on the board of PSEA in some capacity since 1995 as director, 1st and 2nd president and currently treasurer and once held the position of director for NAEA. She enjoys cultivating her roses, long distance (50 mile) walks, water gardening and her family. The area of tax practice she finds most challenging is anything that comes in the door on April 14th. When asked what she would like to see develop within the profession of Enrolled Agent, she stated, "I want the world to know the term Enrolled Agent and know we are indeed the Tax Professional."

Volunteer for a committee...

Are you interested in volunteering in some capacity with PSEA, but aren't sure what you would enjoy? The following are various committees that operate behind the scenes in promoting both the organization and the role of Enrolled Agent in the Pennsylvania tax community. A Board member or general member may chair the committee. Members of the Board of Directors or general members can assist the chair.

Audit

The audit committee has the responsibility to trace transactions from the organization's books and records to determine that –

- 1) all funds are accounted for
- 2) funds are disbursed in the manner approved by the membership
- 3) the tax return was properly completed and timely filed if a 990 or 990 EZ is required for that year

An annual audit report is presented to the board and the general membership with findings and recommendations. At present, there are only two members on this committee, Ron Calhoun from York, PA and David Campsey from Claysville, PA. Both members are also Board members.

Since the books and records are located in Manchester, PA, Ron Calhoun performs the audit. David Campsey then reviews the results. The audit function would improve greatly if additional members volunteered to help Ron Calhoun with the audit and/or reviewed the results and compiled the report with both Ron and Dave. This experience would give you a much greater exposure into the everyday functions of our organization. If you're interested in more information, please contact Ron Calhoun, ron@calhounandassociates.com or call 717-840-8832. If you are ever in the York area, feel free to drop by his office at Cape Horn and Windsor Roads, Waterford Professional Center, York, PA. Members are always welcome.

Publications

This committee is responsible for editing and publishing the quarterly newsletter PA EA ALERT and sending out communications via a distribution list. Responsibilities include contacting the board and members to gather news and information. Information is sifted from NAEA's website, the IRS and PA for items that are current and may be of particular interest to our membership. In 2007 the PA EA ALERT shifted to electronic distribution. Michelle Long is the current chair and welcomes the assistance of members with good communication and software publication skills.

Education/fEAsT

At the time of publication, a description was not available. Questions may be directed to Bill Matesevac, the current chair.

Awards

At the time of publication, a description was not available. Questions may be directed to Bob Nugent, the current chair.

Government Relations

The purpose of the Government Relations Committee of PSEA is four fold:

- 1) Maintain a presence with the Internal Revenue Service and the PA Department of Revenue in order to keep the agencies aware of our existence as an organization of Tax Professionals who wish to cooperate with them as well as to encourage cooperation from them.
- 2) Establish a liaison with members of the appropriate committees in the PA House and Senate to monitor the PA Legislative process for legislation impacting Enrolled Agents
- 3) Provide a liaison between the taxing authorities and the PSEA membership in order to present the members concerns and problems to the agencies.
- 4) Provide a conduit for dissemination of information from the agencies to PSEA members.

Bill Matesevac and George Meyers co chair this committee.

Committees (cont.)...

Budget/Finance

Ron Calhoun chairs this committee. By being a part of this committee, you will gain a great opportunity to assist in determining future events and goals of our organization. Financial data is gathered during the audit to help assemble a budget for the upcoming year. The budget is presented to the floor at our annual membership meeting for final review and acceptance. The Finance committee also meets with the Treasurer to discuss ways to assist in those duties. Over the past few years, this committee has been dormant. It is the desire of the Board that interest in this committee is renewed. The Board is reaching out to the membership for input into our future. For additional information, please contact Ron Calhoun by e-mail: ron@calhounandassociates.com.

Nominating

The purpose of the Nominating Committee is to identify and qualify a slate of candidates for the membership's election as Officers and Directors for the following year. The candidates must be Enrolled Agents and members in good standing of the Chapter. The slate must be made available to the membership prior to the Annual Meeting. The Nominating Committee's next task is to receive any additional nominations prior to the meeting or from the floor at the meeting, qualify those candidates and then execute the election at the Annual Meeting. The Committee's final task is to report the election's results to the membership. This year's Committee is chaired by Lynda Moscatello, assisted by William Matesevac, George Meyers and Helen O'Planick.

Membership

The purpose of the Membership Committee is to inform continuing members about the importance of membership and to explain the benefits of membership to people with an interest in becoming an active member of the Society. Emphasis is on the recruitment of new members and on the retention of current members. The Committee welcomes all new members with a Welcome Packet and maintains a roster of all members. Please contact Samantha Stewart at slstewart@sisterson.com if you have an interest in or any questions regarding the Membership Committee.

Website

This committee is responsible for updating the website to include newly published newsletters and posting information about events like fEAst and Working Together. The website is updated periodically to include changes in officers and to verify that new and existing web links are accurate. Diana C. Dugan chairs this year's committee.

Long Range Planning

At the time of publication, a description was not available. Questions may be directed to Bill Matesevac, the current chair.

Public Relations

The responsibilities of this committee are to develop and implement programs promoting Enrolled Agents as America's preferred tax specialist, by creating awareness and understanding about the role of Enrolled Agent in the tax professional community. Dawn Filetti currently chairs this committee.

Bylaws/Standard Operating Procedures

The duties of this Committee are to maintain the By-laws of PSEA, handle the incorporation of any amendments to them, and promulgate them as needed to the membership. The Committee also tracks standard operating procedures (SOPs) approved by the Board of Directors. Kathryn McCusker currently chairs this committee.

Taxes: Of life's two certainties, the only one for which you can get an automatic extension.

~Author Unknown

News and views...

Keeping Up With Technology!

Courtesy of Ron Calhoun, EA

Since technology is changing everyday, we often find it difficult just to keep up. One item that I found to be a simple yet an important addition to my practice was the introduction of dual monitors. I came across this idea when I was visiting Helen O'Planick's office. She uses an excellent dual monitor system, setting up one monitor in a convenient location where the client can visually watch as she inputs data onto the tax return. Inexpensive software can be purchased that allows the client to see exactly what is appearing on the main computer screen. This allows the client to be more involved in the preparation of the tax return. It also serves to reduce errors. Clients are quick to point out any misspellings. If you are interested in more information on setting up a dual monitor system, please e-mail me at ron@calhounandassoicates.com.

The Office of Professional Responsibility has the following news to report on www.irs.gov:

- OPR Meets with Newly Formed Advisory Committee Subgroup

In order to provide better guidance, an Advisory Committee under IRPAC was created. OPR met with the group on January 29-30, 2008. It is anticipated that the group will advise OPR on real world dilemmas faced by practitioners on a day to day basis. The committee has members from the ABA, AICPA, and the American Society of Appraisers among others.

- All Approved Enrolled Agent Continuing Education Program Sponsors

Please be advised that the sponsor renewal period has been revised, pursuant to section 10.6(g)(5) of the final regulations governing practice before the Internal Revenue Service (Circular 230). Sponsors will now file an application to renew between May 1, 2008, and July 31, 2008 (past practice had been between December 1, 2007 and January 31, 2008). The effective date of renewal will be "the first day of the third month (October 1, 2008) following the close of the renewal period." Due to this revision, all currently approved program sponsor letters will expire on September 30, 2008, not March 31, 2008. We plan to send out renewal letters, along with Form 8498, in late April 2008. If there are any questions, please send an email to opr@irs.gov or call Mike Hahn at (202)622-6750 (not a toll-free number).

Email Fraud and Identity Theft

The Internal Revenue Service has issued several recent consumer warnings on the fraudulent use of the IRS name or logo by scamsters trying to gain access to consumers' financial information in order to steal their identity and assets. When identity theft takes place over the Internet, it is called phishing. Information updated in April can be found here <http://www.irs.gov/newsroom/article/0,,id=155682,00.html>.

News and views (cont.)...

PENNSYLVANIA

Posted on PA's website 3/13/2008:

The Pennsylvania Department of Revenue has become aware of an error in printed copies of the 2007 PA-40 Pennsylvania Personal Income Tax return booklet.

At the bottom of Page 25, in the right-hand column, under the Column G. PA compensation heading, the number 7 in the list of 1099R codes at the beginning of the first sentence should not be included. The sentence should read, "If you entered a 1099R code 1, 2, 8, 9, J, L or S from a 1099R in Column D, subtract the amount in Column F from Column E and enter the resulting amount (but not less than zero) here."

Requests for copies of an insert correcting and clarifying the error can be e-mailed to the department at <mailto:ra-forms@state.pa.us>.

The error has been corrected in the instructions booklet on the department's Web site, www.revenue.state.pa.us.

If you have any questions regarding this matter, please call (717) 787-8346.

Other PA Updates:

[New Department Enforcement Web Pages](#)

In February and March, the Department of Revenue added two new enforcement pages to its Web site.

The Tax Enforcement page regarding the Business License Information Exchange Program on the requirements of licensing agencies participating in the program to provide information to the department that helps identify licensed businesses that are not paying PA taxes was updated on 3/18/2008.

Read more at <http://www.revenue.state.pa.us/revenue/cwp/view.asp?a=180&q=282614>.

Under Sales & Use Tax, the Motor Vehicle Understated Value Program explains the sales tax reporting requirements when a vehicle is sold or exchanged in PA. This page was updated on 4/23/08.

More information is at <http://www.revenue.state.pa.us/revenue/cwp/view.asp?a=13&q=281914>.

Here is a link to view PA Secretary Tom Wolf's budget testimony on the 2008-2009 budget:

http://www.revenue.state.pa.us/revenue/lib/revenue/Sec_Wolf_08-09_Budget_Testimony.pdf

PSEA Board 2007-2008...



From left to right:

Ron Calhoun, Roxanne Witmer, Helen O'Planick, Kathy McCusker, Jacob Himmelstein, Bob Nugent, Dawn Filetti, Diana Dugan, Mary Ann Jesse, Lynda Moscatello, Dave Campsey, George Myers, Bill Matesevac, and Ed Sulkoske.

Your PSEA Board works hard to provide you with your benefits of membership. Please consider joining the Board in a Board Member or Committee capacity to improve the benefits for all of our members.

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