

# Colorado Society of Enrolled Agents

Volume 18 Issue 5  
September / October, 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

### SEPTEMBER 2006

#### Board Meeting

**Date:** Tuesday, September 25, 2006

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

**Place:** Johnson's Corner  
2842 SE Frontage Rd  
Loveland, CO 80537 (Campion Exit)

**Program:** Ethics

**Speaker:** TBA

### OCTOBER 2006

#### Board Meeting

**Date:** Tuesday, October 24, 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 2*

**Program:** IRS Update

**Speaker:** Deborah Rodgers  
*Internal Revenue Service.*

#### Cost for Dinner & Program:

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



**“Let’s Go  
North”**

## PRESIDENT’S MESSAGE

I hope that your summers have been as productive as mine. I just spent a wonderful and unexpected week with my grandchildren from North Carolina. What a difference five extra people in your house makes. I am worn out.

As many of you know we will be teaching our SEE course beginning Sept 16th. This first part will be the test of how we did on the question writing. It will be a difficult task to teach this year as no one knows for sure what is in the test. What a wonderful treat for the people taking the test this year.

I have missed the last few meeting due to family obligations and I am looking forward to seeing all of you in the Sept meeting at Johnson’s corner.

Have a great rest of the summer and take a well needed breathe of fresh air before we get snowed under in tax season.

Jo Ann

### 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).

- 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*

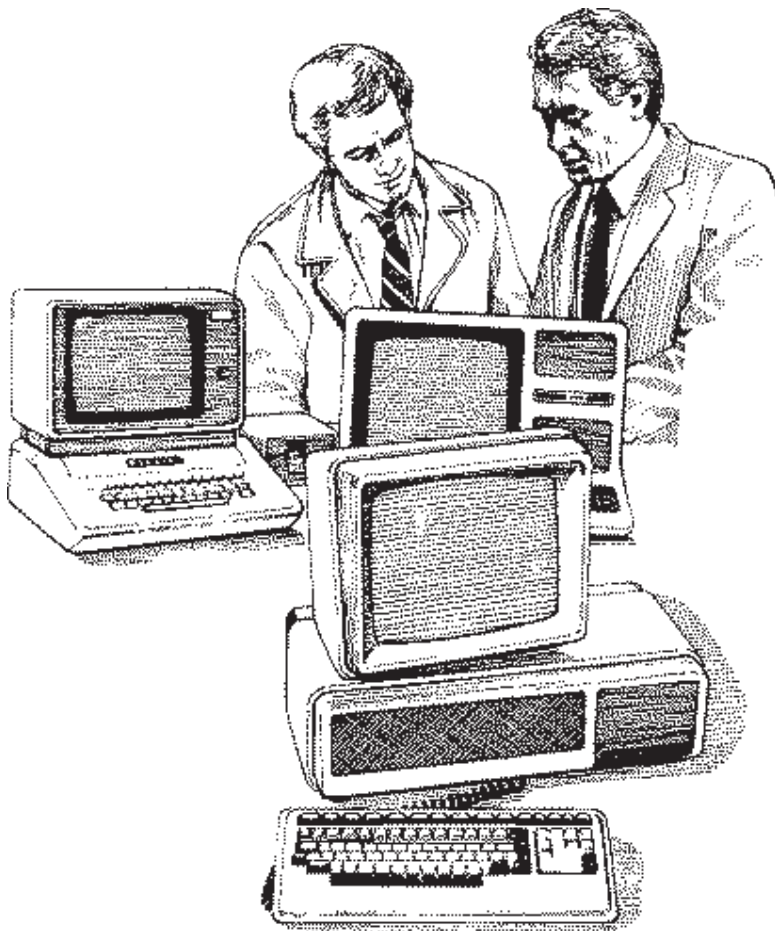
*BIGMIGUEL@AOL.COM*

Fall is about to arrive and I am not ready. I love the summer and always hate to see it gone. I know that summer officially doesn't stop until about September 21st, but it is gone as soon as Labor Day is over as far as I am concerned. Things close up, and peoples hours change and nothing is the same.

Of course I love to get up to the Mountains in the fall to see the beautiful colors, but that is a one day thing, unless you live up there.

Speaking about things changing. We will have the September meeting at a new site. We will be at Johnson's Corner for our dinner and 2 hour Ethics Presentation. It is always nice to get up north for a change. It helps break up the routine of the Holiday Inn, although I like the Holiday Inn compared to what we use to have for our meeting space.

We have had some response to Jack's note about e-mail addresses that aren't any good now. We have received information about e-mail changes as well as address changes. If you just change your e-mail address, then let Jack know. If you change your mail address as well, then let Jack and I know so we can get everything out to you.



## *“Get Your Ethics”*



**Get ready for the meeting**

Good Afternoon,

The requirements and best practices of corporate disclosure are seemingly ever-changing. Are you up to date with the latest changes? Please join us next Tuesday Sept 12 at the Rocky Mountain Chapter of National Investor Relations Institute (NIRI) luncheon at The Westin Hotel – Tabor Center as Brent Fassett, a partner with the law firm Cooley Godward will discuss the latest disclosure developments, recent changes, lessons to be learned and best practices for managing your IR program in this volatile environment.

Both you and your work colleagues are invited to attend (please just email me ahead of time how many we can expect). Please visit <http://www.rockyniri.org/calendar.cfm> for more event information and I've provided essential details below. We hope to see you there.

Kind regards,  
Will

*Will Taylor*

*Catapult PR-IR (for Rocky Mountain Chapter of NIRI)*

*303-581-7760 x 19 ph*

*303-581-7762 fax*

*[wtaylor@catapultpr-ir.com](mailto:wtaylor@catapultpr-ir.com)*

## **PRESS RELEASE**

**FOR RELEASE AUGUST 21, 2006**

**Contact:**

Terri Douglas  
Secretary & Chair, Communications  
Rocky Mountain Chapter, National Investor Relations Institute  
303-581-7760, ext. 18  
[tdouglas@catapultpr-ir.com](mailto:tdouglas@catapultpr-ir.com)

### **NIRI Kicks off new Season with “Corporate Disclosure Update”**

*Denver, Colorado, August 28, 2006* – The Rocky Mountain Chapter of the National Investor Relations Institute (NIRI) today announced its September kick-off speaking event featuring Brent D. Fassett, a partner with the law firm Cooley Godward. NIRI is a professional association of corporate officers and investor relations consultants responsible for communication among corporate management, the investing public and the financial community.

**Who:** Brent D. Fassett has broad, national, multi-industry experience in counseling public companies on corporate disclosure, reporting and securities law compliance as well as financing and merger and acquisition transactions.

**What:** To kick off the new Rocky Mountain NIRI season Brent Fassett will discuss the latest disclosure developments, recent changes, lessons to be learned and best practices for managing your IR program in this volatile environment. The requirements and best practices of corporate disclosure are seemingly ever-changing. Are you up to date with the latest changes? Please visit <http://www.rockyniri.org/calendar.cfm> for more event information.

**When:** Tuesday, September 12, 2006

11:30 AM Check-in

12:00 Noon-1:15 PM Lunch and Presentation

**Where:** The Westin Hotel, Tabor Center

1672 Lawrence Street, Denver

**Cost:** NIRI members - \$38

***FROM JACK*****Special Notice: Meeting Reservations for September**

Jack Rogers will be out of town for the next meeting. For September, Bill Daknis will be taking the meeting reservations at [bill@clergysupport.com](mailto:bill@clergysupport.com) or if you can't use e-mail, 970-667-5819 ext 114.

There will be a regular e-mail notice calling for reservations. If you are not on the e-mail list and want to be, send your name and e-mail address to Jack Rogers at [TaxPrepJR@msn.com](mailto:TaxPrepJR@msn.com).

**A LITTLE BIT OF HUMOR  
FROM ROSIES DINER**

**For safe eating,  
Use condiments**

**THE STRESS-FREE  
TAX GUIDE**

WHAT?

## **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

## **Coming Soon!!**

### **The CoSea SEE Prep Course**

Check your mailbox for the brochure,  
giving you course schedules, times and dates.

This course can be taken for CPE's.

***Sign Up Today!!***

## Coming Events



**“Get  
Ready  
To  
Learn”**

**September 26, 2006 Meeting at Johnson’s  
Corner**  
*Ethics - 2 hours CPE*

**October 24, 2006 Deborah Rodgers**  
*IRS Tax Update*

**November 14, 2006 Deanna Hoffman**  
*Colorado Update*

**December, 2006 Holiday Party**

### **ALREADY PLANNING 2007**

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

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

**March 2007 NO MONTHLY MEETING**

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

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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.

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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)

### **IRS/SSN Issues**

In 2007 we have two opportunities to work with individuals from the Federal Government. January 2007 the program is Taxpayer Advocate Office and February 2007 is Social Security Admin.

Do you have issues with either of these departments? Do you have area in your practice where you would like to know where to go or how to resolve? Do you have a “sticky” problem? This is an opportunity to get some answers.

Send your questions or scenarios for either of these programs to Linda Ward, Program Director at [Linda@lward.biz](mailto:Linda@lward.biz). They will be compiled and presented to the speakers *before* the programs.

As we would like to give our speakers to research your questions and answer all concerns, please send as soon as possible. For the January 2007, need no later than December 1, 2006 and for February 2007 no later than 1,2007.

Take advantage of this opportunity. Any questions contact Linda Ward at 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)

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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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