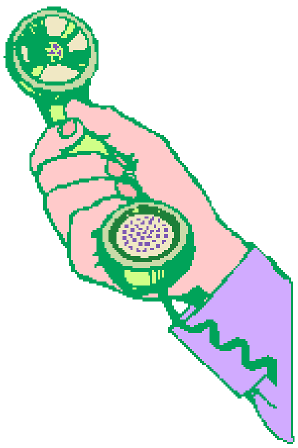
Colorado Society of Enrolled Agents

Volume 22 Issue 4
July / August 2010



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

JULY 27, 2010

Meeting

Date: Tuesday, July 27, 2010

Time: 12:00 - 1:00 PM Luncheon
- California Chicken
1:00 - 2:00 PM Program

Place: Marriott Denver South at Park Meadows
10345 Park Meadows Drive
Littleton, CO 80124

Program: Social Security Benefit programs

Speaker: Michael Baksa
Lead Public Affairs Specialist with Social Security Administration
SSA Benefit Programs

AUGUST 24, 2010

Meeting

Date: Tuesday, August 24, 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 2

Program: HSA

Speaker: Chip Murphy, Health & Life Insurance Broker
Honey Ginger Mahi-Mahi

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

Hope you are all enjoying your summer and getting a little time away from the office.

In their downtime your board has been busy getting the second half of our administration underway. After attending the Affiliate President's meeting last month (see summary article), we have many new ideas and will be continuing our marketing efforts and enhancing member services with tips from the meeting. Our semi-annual board planning meeting will be the end of July. If you have anything you would like us to discuss or plan for in the coming year please let me know.

The summer dinner meetings promise to be very interesting topics. Please take special note that the July 27th meeting is a luncheon (12-2pm) at **Marriott Denver South at Park Meadows, 10345 Park Meadows Drive, Littleton, CO 80124. The Lead Public Affairs Specialist with SSA will be speaking.** With all the new changes coming, it should be very informative. Also save the date for our upcoming **IRS seminar November 3rd and 4th**.

The board has been trying to get all members full access to member information. As part of your summer maintenance, please check your information on the NAEA and COSEA websites. Also take special note that your CPE Records are in order (see CPE Article in this newsletter)

Thank you for letting me represent our strong Society in Washington DC in April. In August I will again be serving on the Nominating Committee for NAEA board. I hope I can represent our society well in this endeavor.

Janeen Ryan, EA

Janeenie2@comcast.net

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).

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 Associates:

Welcome to summer! I hope that you are finding some time to enjoy yourselves after the busy tax season. I am happy that hiking season is here again!

Janeen updates us on her experience at the Affiliate President's meeting in this issue. The board will have new things to share with you after our semi-annual planning meeting.

Charlie Brady is the featured new member in the "Meet the Board" section this month. Welcome to the board Charlie! We are glad to have you and look forward to working with you throughout the year. There are also several new members listed in this issue. Welcome to all the new members! We are glad to meet you!

I hope that some of you can join us at NAEA's National Conference, August 8-10, 2010 at the Mandalay Bay Resort and Casino in Las Vegas, NV. It would be nice if you could all attend the IRS-CoSEA seminar on November 3rd and 4th since this one is local and we are co-sponsors.

Please remember to visit both the federal and state sites to update your contact and profile information. Alerting Richard Van Buren and I when your contact information changes is also a good idea. Joan (our printer) and I (your editor) want to keep your newsletters and alerts coming to you in a timely fashion.

Take care and see you at a meeting or other event soon!

Jeanine

Jeanine Buben-Croy, MT, EA
businesstaxcompliance@yahoo.com
Vice-President, Newsletter Editor and Education Chairperson for CoSEA

"Come to the Meetings"

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

MEET THE BOARD

Charlie Brady, EA

Director

I graduated from Villanova University in 1963 earning a degree in Bachelor of Science in Economics with a major in Accounting. I have spent my entire business career in Corporate Accounting. I also ran a small tax return preparation practice, as a side line.

In 1998 my wife's company transferred us to the Denver area. Faced with the daunting task of starting a tax business, in a new location, I took the less arduous route and decided to work for H&R Block.

I enjoy this position as it presents vast challenges. I find myself meeting new clients, some with unusual problems

Paid Advertisements for Services to CoSEA Members

YOUR AD HERE

This section of the newsletter is for **paid advertisements** for services available to CoSEA members and their clients. **Please contact Jeanine at businesstaxcompliance@yahoo.com with your word copy advertisements. Sizes and pricing are available on the back page of each newsletter.** The editor will inform you when the board approves your ads for a newsletter issue. **Payment for approved ads must be sent by check, written to CoSEA, and mailed to Jeanine Buben-Croy, 6606 W. 79th Ave., Arvada, CO 80003-2305 by the 25th of the month preceding publication of a newsletter issue for the ad to be published.**

FEDERAL UPDATES

CPE Record Retention Reminder:

As the Return Preparer Regulations get formulated OPR (Office of Professional Responsibility) is beginning audits of Enrolled Agent's CPE Records. In the last enrollment cycle they audited about 150 Enrolled Agents and found that we are not taking classes that qualify or keeping appropriate records. Below is a reminder of what we should be retaining, as well as, the requirement for qualifying education:

1. All CPE for Enrolled Agent license must be on <u>federal</u> taxation
2. Keep signed CPE certificate
3. CPE certificate should have an adequate description of the class. If more detail is needed to show content, it is suggested by OPR that a table of contents from class or course materials be kept to prove that it is on <u>federal</u> taxation.
4. 2 hours of Ethics is required per year
5. 72 hours total is required per 3 year cycle (with at least 16 hours per year)
6. Be sure to sign in at all classes
7. Keep all records for the current enrollment cycle as well as the previous. This would be up to 6 years of CPE information.
8. Other CPE classes may qualify for the NAEA requirement which is 30 hours of CPE per year. Examples of non-qualifying CPE for the IRS would be practice management, State tax updates, etc…
9. The determination of CPE qualifying is the responsibility of each Enrolled Agent.

Hope this helps. Please refer to Circular 230 for other information. Any questions please contact me at Janeenie2@comcast.net.

Janeen Ryan EA, President COSEA

APEX (Affiliate President's Exchange Meeting) Summary:

By: Janeen Ryan EA

In April I attended the APEX meeting in Washington DC. The following topics were discussed.

Our first presentation consisted of marketing techniques for the association. It was presented by Terri Langhans. The first point was that we need to market our organization by letting people know what we can do for them. In order to accomplish this the board needs your input on what you want or get from the organization. Let us know and we can proceed to the next steps which are developing the right marketing list and properly responding and fulfilling these wants and needs once they join. This is definitely a group effort for all of us!!!
Some interesting tidbits from the morning session were:

1. Only 20 % of members open their weekly E-Alerts. If you are not, you may want to give it a scan now and then. If you are not receiving E-Alert in your email let me know and we can track down the glitch.
2. California has a new plan they are formulating called EACT—Enrolled Agent Career Track—which sounds very interesting. We will keep our ears open for more details later. We presently market Enrolled Agents as a career at Metro State College twice a year and at PASC events. If anyone is interested in this committee let me know.
3. NAEA is partnering with CalSurance in the near future to offer EO insurance.
4. Texas and Arizona do virtual chapters online. Anyone interested in starting one in Colorado?!?!? Let us know and we will see what we can do to help.

Continued on page 6

FEDERAL UPDATES

APEX continued from page 5

The next part of the day was Nadine McPhail from OPR. We had a very spirited discussion about CPE for Enrolled Agents. OPR expects that they will see a 25% increase in EAs in 2010. They expect the number to rise to 50000 by the end of the year. In addition because of the regulation of Return Preparers, there will be an increase in demand for CPE providers and sponsors. COSEA needs to figure out how we will be able to provide membership support to these new EAs and CPE to Return Preparers. Please see the CPE article in this newsletter about CPE tips for EAs.

Our next speaker was David Williams from the IRS. He spoke on the regulation of Return Preparers. You can watch the whole recorded speech on NAEA's YouTube channel. The details are still in the works but here is what we have so far. This year all return preparers (including EAs) will have to acquire or reapply for their PTIN. There will be a fee for applying which he estimated to be between $100-$200 for a three year application. The IRS is working with OPR and NAEA to figure out how to combine this fee with the three year fee we already pay for our Enrolled Agent license. IRS does not know when testing will begin. At this time they envision a couple of tests depending on a Preparer's specialty. Preparer's will have to take CPE to maintain their registration. IRS will publish a list of Registered Return Preparers and try to educate the public to only use preparers on this list. NAEA is working closely with the IRS to make sure that the distinction is still made that EA's are The Licensed Tax Professionals.

ON-LINE CPE TESTING

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.

STATE UPDATES

ATTENTION TAX PROFESSIONALS –

When you are filing Colorado individual income tax electronically for your clients this year, please note that if your client owes tax, your software should not allow Colorado checkoff donations to be made on returns with tax liabilities. Taxpayers who have a refund may donate a portion of the refund, but those who owe will not be able to make checkoff donations on their return. Donations may be made directly to the organizations listed on the 2009 Colorado 104 individual income tax return. For information about each checkoff program and links to each fund, visit www.CheckoffColorado.org

Colorado Department of Revenue
Taxpayer Service Division
www.TaxColorado.com

COLORADO UPDATES

If you are not currently getting the Colorado Tax Professionals updates via email from the Taxpayer Service Division, you may sign up at tpspublicinfo@spike.dor.state.co.us.

STATE UPDATES

Welcome New Members

Anthony Adley, EA
Tax Works Inc.
1823 Folsom St., Ste 103, Boulder, CO 80302-5738
Telephone: 303-449-4413, Fax: 303-442-1422,
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website: www.taxworks.biz

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Email: lawild@lwild.com

Effective Saturday, May 1, 2010, candy and soft drinks, including candy and soft drinks sold in vending machines, **are no longer exempt from Colorado sales tax**. The 2.9 percent state sales/use tax must be added to retail purchases and retailers will collect and remit the tax to the Colorado Department of Revenue.

For details about this change, please see the following Web page on the Colorado Taxation Web site:
http://www.colorado.gov/cs/Satellite/Revenue/REVX/1251571246154
Colorado Department of Revenue
Taxpayer Service Division
www.TaxColorado.com
tpspublicinfo@spike.dor.state.co.us

ANNOUNCEMENTS AND ACTIVITIES

SAVE THE DATE!

Join us at NAEA's National Conference, August 8-10, 2010 at the Mandalay Bay Resort and Casino in Las Vegas, NV. This fantastic event will include the prestigious National Tax Practice Institute (NTPI®), and introduce new opportunities - a Graduate Track in Representation, a Tax Prep Issues/Tax Practice Management Track as well as an in-person SEE Review. NAEA's 38th Annual Meeting and Board of Directors Meeting will be held August 11, 2010. For more information, visit www.naea.org!

November 3-4

IRS-CoSea Seminar, Location TBA

2 day schedule includes:

Day 1, Passive Activity
Day 2, S-Corps

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.

"Get Ready To Learn"

COMING EVENTS

2010 PROGRAMS

September 28 – **Ethics,** Johnson's Corner
Steve Phillips, IRS Agent

October 26 – **Colorado Tax Update**
Holiday Inn
Mexican Fiesta - Buffet

November 3 – **Passive Activities**
Lucy Clark, retired IRS

November 4 – **Sub S Corporations**
IRS

November 16 – **IRS Tax Update,** Holiday Inn
Taste of Sicily - Buffet

December 12 – Holiday Party - (Sunday) brunch starts at noon and show at 2 pm
Show- "I'll Be Home for Christmas" (USO style show – Bob Hope style – features some of the songs from the late 40's and early 50's)
Ticket price - $40.00 per ticket
Seating is limited – taking reservations now
– payment due in November

2010 SEMINARS

November 3-4
IRS-CoSea Seminar, Location TBA
2 day schedule includes:
Day 1, Passive Activity
Day 2, S-Corps

Published bimonthly by

COLORADO SOCIETY OF ENROLLED AGENTS

Affiliate of the National Association of Enrolled Agents

www.taxproco.org

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 businesstaxcompliance@yahoo.com. Submit contracts and/or payments to Jeanine Buben-Croy, EA, 7330 W. 88th Ave., Unit E, PMB # 171, Westminster, CO 80021. Make checks payable to CoSEA.

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 businesstaxcompliance@yahoo.com.

The 2010 Tax Year Quickfinder - by Thompson Reuters

We will be doing a bulk order for only the 4 most popular Quickfinder Tax Handbooks 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 2010 tax year. For the 4th year in a row there is no price increase. **Due to the complexity of the additional products, the CD's which sometimes they will update after the initial order, 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. There are 3 new for handbooks for 2010. The IRA & Retirement Handbook, the Social Security & Medicare Handbook and the Guide to 2009 & Spring 2010 Tax Acts. These new books are **not** part of our bulk order.

All 4 of the Quickfinder Handbooks 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 & the Small Business Handbook will cost **$37.50 each.** The Premium Edition combination & the All States Handbook 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 cost **$63.50 each.** The All States Handbook will cost **$73.75 each.**

Paul Matonis is handling all the details and your order needs to be received by Paul by **Wednesday December 1, 2010.** The preferred method of picking up your Quickfinder Handbooks is from Paul at our January Monthly Dinner Meeting. He will be happy to mail you the handbooks. The additional postage is listed below.

Here's how to order. Make your check payable to **CoSEA**, specify The 1040 Book and/or the Small Business Handbook which cost **$37.50 each**. The Premium Edition combination Handbook cost **$63.50 each**. The All States Handbook 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 books, $12 for three books etc. 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®

2010 TAX YEAR PRODUCTS

Colorado Society of Enrolled Agents

Please use your association discount code on every order!

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 ....(Required for order confirmation)

Day Phone (.................) ....

Mail Check to: Quickfinder
36786 Treasury Center
Chicago, IL 60694-6700

Phone: 800-510-8997
Fax: 817-877-3694

Payment Enclosed: ☐ Check ☐ Money Order

Credit Card Account # ☐ Visa ☐ MasterCard ☐ Discover ☐ AMEX

Expiration Date: Month Year

Cardholder's Name

Cardholder's Signature

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

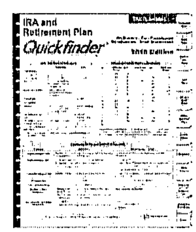
Quickfinder Products	Quantity/Number of Units: Print	CD	Unit Price (see below)	Total
Handbooks				
NEW! IRA and Retirement Handbook				
NEW! Social Security and Medicare Handbook				
NEW! Guide to 2009 and Spring 2010 Tax Acts				
Premium Handbook				
1040 Handbook				
Small Business Handbook				
Individuals—Special Tax Situations Handbook				
Depreciation Handbook				
Tax Planning for Individuals Handbook				
Tax Planning for Businesses Handbook				
Accounting and Bookkeeping Handbook				
All States Handbook				
California Tax Handbook				
Other Products				
Tax Tips Newsletter (one year/12 months)		----------------	$50 + $4 S/H	
Package QF-X (Individual or Business)		----------------	$9 + $3 S/H	
Laminated Tax Tables (Individual or Business)		----------------	$9 + $3 S/H	
Client Quick Reference Tax & Wealth Schedules		----------------	$11 + $3 S/H	
Wall Calendar		----------------	$9 + $3 S/H	
CPE Product Code ____________		----------------		

Questions? Visit Quickfinder.com or call 800.510.8997
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.

Order Subtotal	
Shipping & Handling (see below)	
Sales Tax (apply your rate)	
TOTAL	

Quickfinder Product Pricing Guide	1 unit	2 – 10 units	11 – 20 units	21+ units
All States Handbook	$71	$67	$63	$58
Premium Handbook	$63	$60	$58	$56
Other Handbooks	$40	$38	$35	$33
Shipping for all Handbooks	Print - $4 each	CDs and Other Products - $3 each per unit		

Introducing the new IRA and Retirement Quickfinder Handbook



Get all the quick answers you need about IRAs and retirement plans in one handy source, as only Quickfinder can provide. In addition to concise discussions of important topics, you'll get loads of quick reference tables, charts, checklists, worksheets, examples and other useful information.

Also Introducing

- *Social Security and Medicare Quickfinder Handbook*
- *Quickfinder's Guide to the 2009 and Spring 2010 Tax Acts*

Discounts: The highest discount will be applied to your order; Cannot combine discounts & special offers. **Qty Discounts:** Combined quantities of the SAME TITLE are eligible for a qty discount (e.g., buy six 1040 Handbooks & pay $38 ea., instead of $40 ea.). Discount does not apply when purchasing different titles (e.g., buy two 1040s & three Small Business Handbooks). **CD Discounts:** 20% off each CD when purchased with print version. **S/H and Sales Tax:** Applicable state & local sales tax & shipping/handling charges will be added at time of order.
FOB Shipping Point

THOMSON REUTERS™

The 2010 TaxBooks - by Tax Materials, Inc.

Due to the complexity of the additional products this year we will only do a bulk order for the 6 types of handbooks listed here since the main savings with the bulk order is the shipping cost of the books. The prices are very similar to last year. We will do a bulk order of only the 1040 Edition, the 1040 Plus Edition the Small Business Edition the Deluxe Edition the Deluxe Plus Edition which is a combination of the 1040 and the Small Business handbook and an All States Edition. The Plus editions include the W-2/1099 Roadmap & the Clients with Children Fast Tax Facts.

They also offer the TaxBook Web CD which is has both the 1040 & Small Business Books plus IRS Publications, Instructions, Forms, Revenue Rulings, Court Cases and more. In the past they did a mid-tax season update on the Web CD so when you order this product directly from them you get the update a lot quicker. Last but not least they have a Fast Tax Facts a laminated tri-fold of handy tax info, this year they have a total of 6. These products you will need to order on your own. Use the enclosed flyer with our Society's mail code **#265** in order for us to receive the rebates from Tax Materials Inc.

All 6 of the TaxBook products we will do a bulk order for have a shipping & handling charge plus 6.7% sales tax. So each product's quoted price will include S&H plus sales tax. The 1040 Edition and the Small Business Edition will cost **$42 each**. The 1040 Plus Edition will cost **$50**. The Deluxe Edition which is the combination 1040 & Small Business will cost **$64 each.** The Deluxe Plus Edition will cost **$72**. The All State Edition will cost **$69 each.**

Paul Matonis is handling all the details and your order needs to be received by Paul by **Wednesday December 1, 2010.** The preferred method of picking up your copies of the books is from Paul at our January Monthly Dinner Meeting. He will be happy to mail you the books. The additional postage from his office is listed below.

Here's how to order. Make your check payable to **CoSEA**, specify The 1040 Edition or the Small Business Edition which is **$42 each**, The 1040 Plus Edition is **$50 each** the Deluxe Edition is **$64 each** The Deluxe Plus Edition is **$72 each** or the All States Edition is **$69 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. 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.

If you want to order directly from The TaxBook use the enclosed flyer to place an order on your own and please use our **mail code #265** so that our Society will receive credit for your purchase. Again feel free to call Paul if you want any additional information on their products or to figure the cost.

THETAXBOOK™ Real Answers. *Real Fast!*

$5 donation to COSEA for every copy of *TheTaxBook*™ purchased using code 265.

Colorado Society of Enrolled Agents

For Discounts Mention Code: **265** Order By Mail, Online or Phone!

MVP MAXIMUM VALUE PRICING The more MVP Items you order, the more you save on each item!

Build Your Own Value Package!

STEP 1 Total MVP Items **A** Sum of Quantity Column

STEP 2 Determine Your MVP Price Column

- Order any **1** Total MVP Item, use this price column for the item.
- Order any **2** Total MVP Items, use this price column for each item.
- Order any **3–5** Total MVP Items, use this price column for each item.
- Order any **6–10** Total MVP Items, use this price column for each item.
- Order any **11–20** Total MVP Items, use this price column for each item.
- Order any **21+** Total MVP Items, use this price column for each item.

STEP 3 Calculate Cost

Example: If "**Total MVP Items**" equals 7 Total MVP Items, then use the "6–10 Total MVP Items" price column for each item.

Use the Price Column equal to your "Total MVP Items"

	MVP Items	Quantity	1		2		3–5		6–10		11–20		21+		Item Price	Cost
TheTax Book Series and Binder	Deluxe Edition	×	$69	$65	$67	$63	$65	$61	$64	$60	$63	$59	$62	$58	$	= $
	Deluxe Edition *Plus*	×	$77	$73	$75	$71	$73	$69	$72	$68	$71	$67	$70	$66	$	= $
	1040 Edition	×	$44	$41	$43	$40	$42	$39	$41	$38	$40	$37	$39	$36	$	= $
	1040 Edition *Plus*	×	$52	$49	$51	$48	$50	$47	$49	$46	$48	$45	$47	$44	$	= $
	Small Business Edition	×	$44	$41	$43	$40	$42	$39	$41	$38	$40	$37	$39	$36	$	= $
	All States Edition	×	$76	$71	$74	$69	$72	$67	$70	$65	$68	$63	$67	$62	$	= $
	TheTaxBook Binder	×	$16	$13	$15	$12	$14	$11	$13	$10	$12	$9	$11	$8	$	= $
WebCD	*TheTaxBook* WebCD	×	$99	$91	$92	$84	$85	$77	$78	$70	$71	$63	$64	$56	$	= $
	WebCD Site License	×	$289	$279	$269	$259	$249	$239	$229	$219	$209	$199	$189	$179	$	= $
ClientTax Tools (30 pack)	Pocket Calendars	×	$45	$40	$42	$37	$39	$34	$36	$31	$33	$28	$30	$25	$	= $
	Donation Trackers	×	$45	$40	$42	$37	$39	$34	$36	$31	$33	$28	$30	$25	$	= $
	Social Security/Medicare	×	$45	$40	$42	$37	$39	$34	$36	$31	$33	$28	$30	$25	$	= $
	Understanding Health Care	×	$45	$40	$42	$37	$39	$34	$36	$31	$33	$28	$30	$25	$	= $
FastTax Facts Series	1040 and Small Business	×	$16	$13	$15	$12	$14	$11	$13	$10	$12	$9	$11	$8	$	= $
	Clients With Children	×	$16	$13	$15	$12	$14	$11	$13	$10	$12	$9	$11	$8	$	= $
	W-2/1099 Roadmap	×	$16	$13	$15	$12	$14	$11	$13	$10	$12	$9	$11	$8	$	= $
	Starting a Business	×	$16	$13	$15	$12	$14	$11	$13	$10	$12	$9	$11	$8	$	= $
	Employee Benefits	×	$16	$13	$15	$12	$14	$11	$13	$10	$12	$9	$11	$8	$	= $
	Depreciation	×	$16	$13	$15	$12	$14	$11	$13	$10	$12	$9	$11	$8	$	= $
TheTax Review Series (Self-Study CPE Courses)	Clients w/ Children Review	×	$45	$42	$41	$38	$38	$35	$35	$32	$32	$29	$29	$26	$	= $
	New Tax Law Review	×	$39	$36	$36	$33	$33	$30	$30	$27	$27	$24	$24	$21	$	= $
	Deluxe Tax Review	×	$50	$47	$46	$43	$42	$39	$38	$35	$34	$31	$30	$27	$	= $
	Individual Tax Review	×	$39	$37	$36	$34	$33	$31	$30	$28	$27	$25	$24	$22	$	= $
	Small Business Tax Review	×	$39	$37	$36	$34	$33	$31	$30	$28	$27	$25	$24	$22	$	= $
	IRS Rules for Ethics	×	$33	$32	$31	$30	$29	$28	$27	$26	$25	$24	$23	$22	$	= $
	Health Care Reform Review	×	$39	$36	$36	$33	$33	$30	$30	$27	$27	$24	$24	$21	$	= $
TheTax Authority	Health Care Reference	×	$35	$32	$32	$29	$30	$28	$28	$26	$26	$24	$24	$22	$	= $
	What's New 2010 & Beyond	×	$35	$32	$32	$29	$30	$28	$28	$26	$26	$24	$24	$22	$	= $

2010 Order Form

Toll Free: 866-919-5277
www.thetaxbook.com

Customer # ____________ (enter if known, not required)

Company Name ____________

Name ____________

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

City, State, Zip ____________

Email ____________ (Needed for order and shipping confirmation)

Phone ____________ Billing Zip ____________ (If different, needed for credit card orders)

Non-MVP Items		Quantity	Item Price	Cost
	Pre-Punched Paper Pack	×	$7.95 $6.95	= $
	ClientTaxTools Holder	×	$6.95 $5.95	= $
	Total Non-MVP Items: **B**			

Shipping & Handling Charge Total Quantity of All Items × Shipping & Handling Charge per Item	Total Quantity of All Items **A** + **B**	Shipping & Handling Charge Per Item (see chart below)	Shipping & Handling Charge*
Shipping & Handling Charge	×	$ /item	= $

Shipping & Handling Charge Per Item

Total Quantity of All Items	1 Item	2 Items	3–5 Items	6–10 Items	11–20 Items	21+ Items
Shipping & Handling Charge Per Item	$5.50/ item	$4.50/ item	$4.00/ item	$3.50/ item	$3.00/ item	$2.00/ item

* Please call for international orders.

PAYMENT OPTIONS *Remember to include credit card number & expiration date.*

Credit card is charged separately for each shipment.

Credit Card: ☐ MasterCard ☐ Discover ☐ Visa ☐ American Express

AmEx (4 digits)

Expiration Date 3-Digit Security Code (optional) Cardholder's Signature

☐ Check or Money Order payable to: Tax Materials, Inc.

MAIL CODE **265**

Step 4	Total of Cost Column (include S&H charge)	$
Step 5	MN residents add 7.275% sales tax	$
Step 6	Step 4 + Step 5 = **Grand Total**	$

Orders are shipped first-in, first-out *starting* on the start ship date of the product.

Tax Materials, Inc.
Tax Materials, Inc.
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