

President's Message

Alexander B. Thomson, EA, CFP

Wow. What a fall and winter this has been. VASEA began its 25th anniversary celebration with the cruise to Bermuda in September. The October 15th extended tax filing deadline has become, for most of us, as busy as April. 15th. With the conclusion of one of the longest presidential campaigns in U.S. history, many changes are coming to Washington DC and Congress, which will almost certainly lead to changes in the tax code.



During all of this, your VASEA Board of Directors has been hard at work for you. Following our meeting in July, a survey was sent to all members to gather input on a number of issues and concerns to VASEA. The response was very good and gave us a wealth of information for planning purposes. Based on the results of the survey, the Board met for an all day session in Richmond in October to update the association's strategic plan. (The NAEA Board met in November to update their strategic plan as well.)

At the next Board meeting, in January, we expect to complete the two year project to rewrite the VASEA Policy & Procedures Manual. While this is one of those "mundane" projects, like the revision of the Bylaws completed last year, it is important to insure our society functions in an efficient and business-like manner. The draft of updated "Local Chapter Guidance" will be sent to every chapter early in 2009 for review and comment before adoption by VASEA.

The Education Committee, chaired by Ken Whitley, has done a superb job of developing and scheduling another year of first class programs. The SEE instructor program, under the supervision of Barry Iacono continues to expand and help us grow new EA's and VASEA members. The Membership Committee, chaired by Alisa Lam, recently held

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Welcome New Members and Associates!

Congratulations to the following new members and associates of the Society!

Manuel S. Baltodano, EA
Alexandria, VA

Judith E. Belzer
Colonial Heights, VA

George Blyakhman
Richmond, VA

Deborah Hargis
Virginia Beach, VA

Gerald S. Lisk, EA
Virginia Beach, VA

Rachit Mahajan, EA
Ashburn, VA

Caroline Miller, EA
Broadlands, VA

Roy T. Ruble
Ashburn, VA

Deloris Stewart
Manassas, VA

Hortencia Torres, JD, EA, ABA
Falls Church, VA

Elizabeth F. Yeatman
Montross, VA

Seasons Greetings

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a conference call with chapter representatives to discuss survey results relating to membership issues and update the new member welcome procedures and package. The Public Relations committee, chaired by Becky Donehew, is working on a number of initiatives (in concert with NAEA) to promote and increase EA visibility.

We are always looking for members who are willing to serve on committees or are interested in running for the Board of Directors. If you would consider participating at the state level, please send me an email or give me a call. The election of new VASEA officers and directors will take place at our Annual Meeting in June.

Winston Macon, former VASEA President, has been nominated to serve as a Director of NAEA. After 27 years with the IRS, he became an EA in 1996, and as a member of both the Richmond and Northern Virginia Chapters, has held

numerous offices at both the local and state level. He is extremely well qualified to serve and I encourage you to vote for our fellow VASEA member. The election will take place on-line December 1-15.

The Northern Virginia Chapter has invited you to join them in McLean, Virginia on Saturday, January 24th for the 20th Annual Tri-State Seminar. If I don't see you at Tri-State, I look forward to seeing you in Fredericksburg in June for the Spring Seminar and gala celebration of our 25th year anniversary.

On behalf of my family, I wish you and yours a safe and Happy Holiday, and a prosperous New Year.

Warm regards,

Al

Education Committee Update

by Kenneth W. Whitley, Sr., EA, VASEA Education Committee Chair

The VASEA Education Committee has been an active committee since VASEA was formed in 1983. Through the years there have been many changes in the committee chair and committee members; yet one thing I make note of is that all of those who have served on the committee have been faithful volunteers who were willing to give of their time and talents to make VASEA a better organization. It would be impossible to list all of those members here but I would like to acknowledge the current committee volunteers: Barry Iacono, EA, CFP, Patricia Inman, EA, Cyndie Jeanguenat, EA, Winston Macon, EA, Thomas Oldis, EA, Heather Greenwell, VASEA Administrator, Al Thomson, EA, CFP, VASEA President and Ken Whitley, EA, Committee Chair. During each year the committee meets about four to five times to do its work of education planning. These dedicated volunteers work faithfully

to plan and implement the education events that VASEA puts on; and yet, as important as these folks are, of utmost importance in the whole scheme of things are the professionals that attend our functions. Without the attendees our education programs would not mean very much. Credit should also be given to the many, many speakers who have come and been a part of the programs.

You can be assured that our committee will continue to work hard to provide you with the best education and sincerely hope that you continue to come to our seminars and help us be the most successful organization. In the meantime please communicate with us if you have suggestions for improving our programs or if you have complaints you want to share with us. We pay attention to what you have to say.

Nominating Committee Update

by Edward P. Griffing, EA, LLC, VASEA Nominating Committee Chair

Three Director positions are available for election next June 2009 at our Spring Seminar. Two incumbents, Diane Beverly, EA and Steve Rue, EA have agreed to continue to serve an additional two years but another, Charles Spencer has resigned his position. We need to find a replacement for Charles, perhaps most appropriately from the Roanoke area.

Our Society benefits and individuals who contribute their leadership skills also benefit from the recognition and experience gained during service on our Board. Please

contact the Nominating Committee Chair, Edward P. Griffing, EA LLC of Northern Virginia or your local committee member with your offer to serve or any suggestions. Area Nominating Committee members are: Deborah Gladden, EA, Fredericksburg; Nancy Taylor, EA, Hampton Roads; Rebecca Donehew, EA, Roanoke; and Winston Macon, EA, Richmond. We must have a firm slate of candidates by Friday, December 12th.

Northern Virginia Chapter Announces 2009 Tri-State Seminar

Mark your calendar and save the date. The Northern Virginia Chapter has announced the 20th Annual Tri-State Seminar will be held on Saturday, January 24, 2009 in McLean, Virginia. Once again, Paul LaMonaca will serve as the afternoon moderator.

This event brings together state tax representatives from Virginia, DC and Maryland to provide an update on changes in their forms, regulations and tax laws.

The seminar is unique in its focus on state tax matters, and the participation of state tax authorities. Each jurisdiction makes a one hour presentation during the morning. Following lunch, in a workshop setting, a number of typical taxpayer

problems are worked on the 2008 tax forms of VA, MD and DC.

Case book examples examine how a tax situation should be handled in each of the states. The case discussion also addresses how transactions are handled where the taxpayer lives in one jurisdiction and transacts business or receives income from another.

Eight hours of CPE are available for completion of the Tri-State program. Registration forms will be mailed to all VASEA members by the end of November. A \$30 discount off the price of \$180 is available for participants registering before December 20, 2008.

NAEA PAC Update

The NAEA Political Action Committee (PAC) continues to ask for your support and contributions, as it supports incumbent Members of Congress who sit on the tax writing committees. The PAC is run by a steering committee, which applies a stringent set of criteria to determine where contributions to elected officials will most benefit EA's.

During the most recent election cycle, the NAEA PAC made 16 contributions totaling \$29,000, with 14 being reelected. In the previous cycle the PAC assisted six candidates in winning reelection to Congress.

Your support is crucial to the long term mission of NAEA PAC. Even a small contribution can help us reach our 2008-2009 goal. Because we need to participate in the electoral process every year, we need to replenish our funds on an annual basis. NAEA members who contribute at least \$35 receive a custom lapel pin designating their special status as an NAEA PAC supporter.

For more information, or to contribute, visit www.naea.org or email pac@naea.org.

NAEA Election - Remember to VOTE!

Remember to cast your vote for the 2009-2010 NAEA Board of Directors. The November/December *EA Journal* contains an article from NAEA's Nominating Committee Chair, Diana Thompson, EA, a sample ballot, and bios and goals from each of the nominees and candidates. Members will receive an email from the elections company on December 1, which will provide both information on how to vote and also provide links to the bios and goals of the nominees and candidates. Members will be asked to cast one vote for President-Elect, one vote for Secretary/Treasurer, and five votes for Directors.

VASEA's Immediate Past President, Winston Macon, EA is running for a Director position. During Winston's term as VASEA President, he was instrumental in ensuring a smooth transition from an Executive Director to a management

company to handle the administration of the Society's business. While the Society was in limbo between management, he answered the VASEA phone line himself. Winston also worked diligently to ensure the VASEA Board updated the Society's bylaws to bring them in line with NAEA's bylaws as mandated by NAEA. As President, he was known for reaching out and encouraging input from all Board members. In addition to his service on the VASEA Board of Directors, Winston is currently on the VASEA Education Committee and is an active member of the Richmond Chapter of VASEA.

Whoever you decide to vote for, please be sure to VOTE – it is YOUR Board!

NAEA Membership Service Spotlight

Are you getting the most out of your NAEA membership? This tax season, take advantage of NAEA's on-line tax research service!

As an enrolled agent, you've proven your tax expertise. Even with your experience and knowledge, there are times when you want to verify your memory, read the regulation, or just double check your answers. It's part of providing the best service possible for your clients. You may also run into a unique tax situation from time to time that requires extensive investigation.

The National Association of Enrolled Agents now offers an on-line tax research service. Convenient and easy to use, this service answers your questions and offers written tax guidance in conversational language that you can share directly with your clients. Whether your question requires just a simple fact check or poses a complex tax situation, you can trust the research provided by NAEA's tax research service.

How it Works

There are two parts to this robust service:

- **Tax Knowledge Base** – a dynamic online searchable database answering some 3,000 frequently asked questions. Search by topic, keyword or simply browse the most recent questions asked by other tax professionals. **NAEA members get complimentary, unlimited access to the Tax Knowledge Base.**

- **Send Us A Question**– submit your specific question, including any necessary documentation, directly to our tax research experts for personalized case research. **Two levels of service are offered based on the complexity of the question: Standard and Extensive.**

NAEA members and associates

Standard: \$35 per question

Extensive: \$75 per hour (you will receive an estimate to approve before research begins)

Non-members

Standard: \$50 per question with Tax Knowledge

Base subscription; \$100 per question otherwise

Extensive: \$100 per hour with Tax Knowledge

Base subscription; \$150 per hour otherwise (you

will receive an estimate to approve before research begins)

To check out the tax research service, visit NAEA's website at www.naea.org and click on "Tax Research Service" at the top of the page.

NAEA Public Awareness Initiative

Operation: Close to Home

By Martha J. Lockwood, CAE, APR, NAEA Director of Communications

This whole idea of "Operation: Close To Home" started right after April 15 this year. We were hearing from many of you that, while you were glad we had been able to get national coverage with our EA phone bank on NBC's *The Today Show*, what you really wanted and needed was local coverage right in your hometown. So, we decided to partner with the members of the National Newspaper Association (NNA). The association represents the hometown newspapers that are the "stay around" papers because they carry information every household can use, such as what's on the agenda for the next town council meeting, the menu at the school cafeteria, and if garbage pick-up day has changed. It is also the largest newspaper association.

Just thinking about the millions of households that rely on that quality, reach, and relevance in communities throughout

the nation drove home the point to us that this was where we wanted to put our next public awareness effort—right on America's doorstep, in the communities where we live and work. Our message would focus attention on enrolled agents as the tax preparer of choice in the towns and cities and neighborhoods across the country, where day after day, EAs turn the key on the front door of their offices, and open for business, as good citizens and contributors to their communities' well-being.

The idea of NAEA providing a "Tax Time" supplement for the newspapers that they could download from our website proved to be the answer to the criteria. An exclusive-for-the-NNA-members insert promises copy that is distinct, accurate, and free for the newspapers, while presenting timely and

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interesting content for the reader. “Tax Time” content leads with information on changes in the tax law affecting 2008 returns, and follows up with tax tips, and record-retention information—what records to keep and for how long. We found that we had room for a checklist, too, to show people what documents they need to have on hand for their tax preparer to optimize everyone’s time. So, now we had content—or we would once we had all the changes in the tax laws. There are even some sections (such as the Top Ten Tax Tips) that can be cut down or done away with altogether if our members want to advertise in this exclusive supplement.

This is how it will work: A newspaper commits to publishing the supplement in the latter part of December or in January. They can download it from our website by agreeing to not alter content. When they agree, they also will contact the NAEA offices, and we will work with them to tell them who the members are in the zip codes they serve so that they can offer our members first choice for advertising. After that, advertising will be open to the community at-large. We are encouraging the newspapers to offer business-card-size advertising space so that it is affordable and so that more people can advertise and the publishers have the potential of increasing their advertising base. Simultaneously, we will contact you to let you know which paper in your area has committed to the download and when they plan to publish. If you want to advertise, you will be given their name and number, just as they will be given yours. Members who wish to not be

contacted by the newspaper can opt out of the program entirely. Watch the E@lert for opt-out instructions.

What can you do to make this a reality in your community?

We all realize that many of the smaller newspapers may not be a member of NNA or they may not have been able to go to the Annual Meeting and Trade Show where NAEA President-Elect Sandra Martin and I manned the NAEA booth. If there’s a newspaper in your area, and you believe that they should be carrying the supplement, send an email to me at mlockwood@naea.org. Give me the name of the newspaper, and I will follow up from there. If they are already committed to the program, I will let you know. If not, let’s work together to get them to embrace the idea of carrying the supplement, and subsequently your ad.

It is my hope that this will be the start of a wonderful relationship with America’s community newspapers with a mutually beneficial outcome. It is a combination of targeted public awareness for NAEA members and NAEA members serving their community newspapers by being the source for close-to-home excellence where matters of tax are concerned.

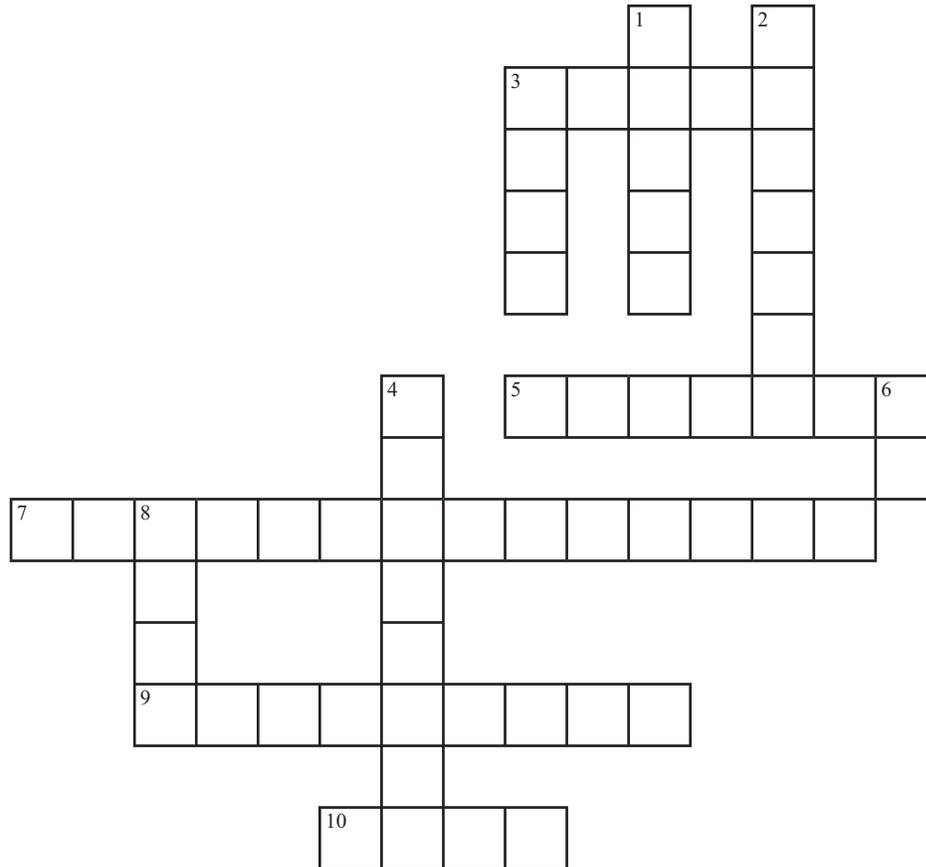
Without question, this a huge project that depends on each of us doing our part to bring the message of EAs close to home.





Happy 25th Anniversary to the Virginia Society of Enrolled Agents!

We hope you enjoy this special anniversary crossword puzzle designed by Board member Julie Compton, EA.



Down:

- 1. Number of Charter members
- 2. The 25th celebration kickoff was a cruise to _____
- 3. First abbreviation for our Society
- 4. Annual NVC event
- 6. Current VASEA President
- 8. VASEA's slogan: Enrolled Agents _____ Tax Problems

Across:

- 3. Name of VASEA's newsletter
- 5. EA of the Year in 2008
- 7. Where the first and most recent annual seminars were held
- 9. VASEA's top priority
- 10. First Executive Director

HINT: Names of persons are first names only.

Down: 1-Fifty; 2-Bermuda; 3-VAEA; 4-TriState; 6-AL; 8-EAse
Across: 3-Voice; 5-Barbara; 7-Fredericksburg; 9-Education; 10-Bess

Virginia Society of Enrolled Agents

2009 Calendar of Events

Save the dates now!

For the most current version of the Society calendar, please visit VASEA's website at www.vasea.org or contact the VASEA Administrative Office at (804) 340-5225 or 1-800-344-8732 toll-free.

Saturdays, May 16-October 17, 2009

SEE Intensive Review Course

This intensive SEE Review Course includes live classroom instruction in combination with online coursework.
More information will be forthcoming.

Thursday-Friday, June 4-6, 2009

VASEA 21st Annual Spring Seminar (22 hours CPE)

Fredericksburg Hospitality House, Fredericksburg, Virginia

Wednesday-Thursday, August 5-6, 2009

NCPE Corporation (C&S) and Partnerships (LLCs) Workshop (16 hours CPE)

Crowne Plaza Dulles Airport, Herndon, Virginia

Friday-Sunday, October 23-25, 2009

VASEA Special Enrollment Exam (SEE) Review Course Crowne Plaza Dulles Airport, Herndon, Virginia

Thursday, October 29, 2009

IRS/VA Department of Taxation Current Tax Issues Seminar (8 hours CPE)

Crowne Plaza Richmond Downtown, Richmond, VA

Tuesday-Wednesday, November 3-4, 2009

NCPE 1040 Individual Income Tax Workshop (16 hours CPE)

Holiday Inn Tanglewood, Roanoke, Virginia

Wednesday-Thursday, November 11-12, 2009

NCPE 1040 Individual Income Tax Workshop (16 hours CPE)

Holiday Inn Select Norfolk Airport, Norfolk, Virginia

Wednesday-Thursday, November 18-19, 2009

NCPE 1040 Individual Income Tax Workshop (16 hours CPE)

Crowne Plaza Dulles Airport, Herndon, Virginia

VASEA Chapter Meeting Information

Blue Ridge Chapter (BRC)

A luncheon meeting, with one hour of CPE, is generally held on the third Wednesday of each month. The lunch meetings begin at noon and are held at various locations. For more information, please contact Rebecca Donehew, EA at (540) 342-1120.

Fredericksburg Chapter (FC)

A chapter meeting, with one hour of CPE, is generally held on the third Wednesday of each month. For more information, please contact Gerald Macheck, EA at (540) 785-2096.

Hampton Roads Chapter (HRC)

A monthly breakfast meeting, with CPE, is usually held on the third Wednesday of each month except May. The breakfast meetings begin at 7:30 a.m. and are held at the Holiday Inn Select, 1570 North Military Highway, Norfolk, Virginia. They do not have a breakfast meeting in May, but instead, hold a four-hour seminar in mid-May. For more information, please contact George S. Walsh, EA at (757) 428-5258.

Northern Virginia Chapter (NVC)

A dinner meeting, with one hour of CPE, is generally held on the fourth Wednesday of each month at 6:30 p.m. Monthly meetings are held at the Marco Polo Restaurant, 245 Maple Avenue W., Vienna, Va. Daytime seminars (3-4 hours CPE; free to chapter members) are held in May and September. In addition, the chapter sponsors the Tri-State Seminar on the third Saturday of January. For more information, please contact Betsy Marron, EA at (703) 243-1915.

Richmond Chapter (RC)

A breakfast meeting, with one hour of CPE, is generally held on the second Thursday of each month except April. The breakfast meetings begin at 7:30 a.m. and are held at the Westwood Racquet Club, 6200 West Club Lane, Richmond, VA. For more information, please contact Brenda Hayes, EA at (804) 755-4892.



2415 Westwood Avenue
Richmond, Virginia 23230