

A publication of Pennsylvania Society of Enrolled Agents—Serving Pennsylvania Enrolled Agents for over 20 years.

## President’s Message

*I especially want to thank our members who generously made a donation to the New York State Society of Enrolled Agents towards their huge expense in seeking recognition of Enrolled Agents as tax professionals exempt from registering as part of New York’s tax preparer initiative.*

Once again we find ourselves dealing with weather issues (too much heat and not enough rain) as we also face the tax deadlines of 9/15 and 10/15 for the 2009 calendar returns. I’m sure most of us are asking how it can be the end of summer already. Hopefully you’ve had a chance to get some family time, some time for yourself and even time away to recharge.

On behalf of the officers and directors of PSEA, I thank the over 115 people who attended the fEAst in State College in June. This event is about helping you, our members, receive good, quality education at a very affordable price. We received many, many positive comments and are planning next years’ event, scheduled for June 12-14, 2010 at the Days Inn in State College. More details will be available in the November newsletter.

I especially want to thank our members who generously made a donation to the New York State Society of Enrolled Agents towards their huge expense in seeking recognition of Enrolled Agents as tax professionals exempt from

registering as part of New York’s tax preparer initiative. Over \$45,000 was spent on their petitions and efforts to protect Enrolled Agents who practice in New York from requiring registration and the payment of fees in the future. That pretty much drained their Treasury. The PSEA Board of Directors made a challenge to those in attendance that we would match from our Treasury, their donations, up to \$1,000. At the end of the 2-day conference, members had graciously donated \$1,400!!! Give yourselves a round of applause – it was a super show of support and our check for \$2,400 was enthusiastically received by NYSSEA. Since then, I have received \$40 more and am still accepting donations on behalf of the New York Society. If you are interested in making a donation, please send your check payable to PSEA to PSEA, c/o Linda Bleil, EA, 4068 Mt. Royal Blvd, #115, Allison Park, PA 15101.

If you’ve been reading the EAAlert in your email box on Friday afternoons, you should be pretty up-to-date on the PTIN registration process that we must all go through beginning in mid-September. The good news is that you’ll be

able to retain your existing PTIN; the bad news is that the fee will be \$64.50 per year. There’s a chance those whose Enrollment period (your social security number ends with a 3,4 or 5) ends 12/31/10 may get a reduction in the fee required to renew your EA status, but that has not been fully decided. The very, very good news is that as Enrolled Agents, we will be exempt from the testing process as long as we remain in good standing as EA’s. The basic rules are to file your tax returns, pay your taxes, get your continuing education credits and engage in ethical practice. Circular 230 is in the process of being revised and mandatory e-filing (with the usual exceptions) will become a basic requirement to remain in good standing as an Enrolled Agent.

It’s also unclear as to how the IRS is going to promote using qualified persons to prepare tax returns – seems to me that the public will need much education on that level. If you have colleagues who are not Enrolled Agents or CPA’s, now is the time to encourage them to take the exam and become an Enrolled Agent to protect their future as a tax professional.

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## President's Message...(cont.)



And if you know someone who is an Enrolled Agent but has not yet joined NAEA, please encourage them to be a member of the only organization dedicated to working for Enrolled Agents.

As we start a new fiscal year, we said goodbye to some directors and welcomed new

ones to serve our community of Enrolled Agents. Please join me in a huge thank you to Bill Matesevac and Dave Campsey for their tireless work on behalf of PSEA. Our new directors, Lisa McAllister and Joni Cappuccio are waving hello and letting you know they are excited to be working with the officers and previously elected directors

as we face the challenges of clients and tax changes in the months to come.

Stay safe and well.

*Linda*

## Treasurer's Report...

Financial reports as of June 30, 2010 are on page 10.

## Member News...

### Congratulations to PSEA members of the 2010 Class of Fellows!

Please join PSEA in congratulating the following Pennsylvania Enrolled Agents who've graduated with the 2010 Class of Fellows by completing a demanding three level curriculum through the National Tax Practice Institute (NTPI), qualifying them to effectively represent their clients before all administrative levels of the IRS. Congratulations to Francis Cellini, EA and Roxanne Witmer, EA!

### PSEA member is NTPI instructor!

Among those sharing their expertise as a Level 1 and Level 3 instructor at this year's NTPI was Pennsylvania chapter member Helen O'Planick, EA.

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Your career and personal milestones, awards and recognitions are an encouragement to your fellow EA's to aspire to high professional and personal goals. If you're aware of news items to include, please email [Michelle Long](mailto:Michelle.Long).

## The Emancipation of Enrolled Agents in NY

The accomplishment of the New York State Society of Enrolled Agents in getting the state of New York to give Enrolled Agents the same consideration as CPA's and attorney's in reference to new registration requirements has tremendous implications for Enrolled Agents overall. It's an interesting narrative of losing a court battle then winning the war legislatively. To read more on the history of how this state chapter worked to achieve this go to [http://www.nyssea.org/legislative\\_news.html](http://www.nyssea.org/legislative_news.html).

## SAVE THE DATE!!!

Next year's fEAsT in the EAsT is scheduled for June 13th & 14th, 2010 in State College.

## Upcoming Events...

### NCPE Seminars

NCPE is a national tax continuing education provider especially suited to meet the continuing education requirements of enrolled agents. For a brochure including course description, speaker biographies and registration forms go to:

<http://www.ncpeseminars.com/spring%20flyer.pdf>.

#### Corporations (C&S) and Partnerships (LLCs) Workshop (2 Days)

Registration 7:15 a.m. • Workshop 8:00 a.m. - 4:15 p.m. (16 Hours CPE)

\*Allentown - Sept. 16 & 17

\*Sponsor: Pennsylvania Society of Enrolled Agents.

#### 1040 Individual Income Tax Update Workshop (2 days)

Registration 7:15 a.m. • Workshop 8:00 a.m. - 4:15 p.m. (16 Hours CPE)

Allentown - Dec. 8 & 9

Pittsburgh - Dec. 6 & 7

#### SOUTHEASTERN PA REGION

The remaining EA Breakfast Meetings dates in 2010 are following:

September 1, 2010

October 6, 2010

November 3, 2010

December 1, 2010

January 5, 2011

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 Rt 202). Meetings begin about 9 a.m. There is no need to RSVP about attending, but if you have not yet attended a meeting and are not yet on the e-mail list, please contact Craig Argo to confirm the meeting hasn't changed. 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, contact Craig Argo, 610-701-3319 or [argotxpro@verizon.net](mailto:argotxpro@verizon.net).

#### PSEA OFFERS \$25 REBATE ON PA WORKING TOGETHER SEMINARS

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.**

We encourage EAs to sign in as a member of PSEA, even if you're a member of another organization. We're the only organization that offers a rebate. Signing in as a PSEA member at these events gives our organization credibility and federal and state officials listen better if they think we have a viable membership.

The next event will be Western Working Together, a jam-packed CPE event taking place on September 23, 2010.

### Western Working Together

The next Western PA Working Together Conference is scheduled on Thursday, September 23, 2010, at Futules' Harmar House, conveniently located off turnpike exit #48 and Route 28 at 1321 Freeport Road, Cheswick, PA.

This year's energetic agenda will include such topics as:

Hot Topics & Liaison Issues  
PA Department of Revenue and PA Department of State  
IRS Appeals  
Retirement Plans  
Collection Issues  
Cancellation of Debt  
FBAR – Foreign Bank Account Reporting

The anticipated Keynote speaker will be David Williams. He is the Lead for the Tax Return Preparer Review implementation team.

8 CPE credits will be offered at the cost of \$65 if registered and paid by September 1<sup>st</sup>. Following that date, cost increases to \$90. The fee also includes a continental breakfast, hot buffet lunch, and afternoon cookie break.

Complete registration information can be found on the [IRS website](#). If you have any questions, please contact Bill Matesevac, EA at [wpmatzea@windstream.net](mailto:wpmatzea@windstream.net) or 724-468-5086.

## News and Views...

### IRS News

#### **PREPARERS**

According to new IRS regulations, [preparers will have to pay the IRS \\$50 a year for their special tax ID number](#), even for renewals of existing numbers. The IRS will roll out its registration rules the middle of September, requiring all return preparers after this year to register and have a special tax identification number. In the future, the IRS will reduce the separate sign-up and renewal fees charged to enrolled agents who get preparer ID numbers. However, return preparers will have to pay an extra 14.95 to the outside vendor the IRS hired to run the registration system.

*with the assistance of Kraig Klinke, EA*

#### **CHANGE OF ADDRESS—BANKRUPTCY**

Bankruptcy trustees should mail tax refund claims to a new IRS address. The IRS wants them sent to the Centralized Insolvency Operation, Box 21126, Philadelphia, PA 19114. The claims must be marked “Request for Prompt Refund.” The IRS will make a decision within 120 days. See [Rev. Proc. 2010-27](#) for the full details.

#### **TAX TALK TODAY**

[Tax Talk Today](#) returns in January, 2011 with a new CPE series. Subscriptions can be purchased for the entire series at a special pre-tax season price of \$187.50 for 15 credits. NAEA is included in the list of professional organizations sponsoring the series. See the website for a list of the [2011 seminars](#).

### Pennsylvania News

Check out the department’s most recent tax update newsletter on their [website](#). Two items of note are the extension of the property tax/rent rebate credit and the reinstatement of the tax amnesty program beginning August 1, 2010. Also, after some hunting the Fall 2010 Tax Seminar Schedule was found but unfortunately no accompanying agenda. Hopefully this will be available in the DOR’s September tax update. For now see below for this year’s fall seminar dates.

#### **2010 FILING DEADLINE**

Note the 2010 filing deadline for **both federal and PA** will be April 18th due to Emancipation Day being treated as a federal holiday on Friday the 15th.

*Date Prepared: July 12, 2010*

#### **2010 FALL TAX SEMINARS SCHEDULE**

	<b>SPONSOR</b>	<b>DAY</b>	<b>DATE</b>	<b>CONTACT PERSON</b>	<b>CONFERENCE LOCATION</b>
(1)	Revenue Employee Program (Limited to Revenue Employees)	Thursday	09-16-2010	Sylvia Olimpi solimpi@state.pa.us	Rachael Carson Building, DEP Building
(2)	CPE Forum of Central PA 601 Hawthorne Drive, Suite 2-B Hollidaysburg, PA 16648	Thursday	09-23-2010	Kelly Park (814) 695-1558 kelly.park@wfadvisors.com	The Casino 300 Lakemont Park Blvd. Altoona, PA 16602
(3)	Alvernia University 400 St. Bernadine St. Reading, PA 19607	Wednesday	10-6-2010	Alan D. Ross, C.P.A. (610) 372-9911 Aross@RossCpa.com	Alvernia University 400 St. Bernadine St. Reading, PA 19607
(4)	PA Department of Revenue (Limited to Government Employees)	Monday	10-18-2010	Sylvia Olimpi solimpi@state.pa.us	The State Museum of PA Auditorium, 300 North Street Harrisburg, PA 17120
(5)	PSPA	Wednesday	10-20-2010	Sherry DeAgostino 1-800-270-3352 execdir@pspa-state.org	Best Western Lehigh Valley Hotel & Conference Center 300 Gateway Drive Bethlehem, PA 18017
(6)	Duquesne University School of Bus. And Admin. 701 Rockwell Hall Pittsburgh, PA 15282-0104	Tuesday	10-26-2010	Pat Police (412) 396-1643 police@duq.edu	Duquesne Union Hall Duquesne University Campus Pittsburgh, PA 15282-0104
(7)	Wilkes University Continuing Education Dept. 84 W. South St. Wilkes-Barre, PA 18766	Thursday	11-4-2010	Margaret Petty (570) 408-4460 Margaret.Petty@wilkes.edu	The Woodlands Inn and Resort Highway 315 Wilkes-Barre, PA 18766
(8)	Harrisburg Area Community College 1 HACC Dr. Mid 1-209 Harrisburg, PA 17110	Tuesday	11-16-2010	Non-Credit Registration Dept. (717) 780-2414 mjlampre@hacc.edu	C. Ted Lick Wildwood Conference Center Harrisburg Area Community College 1 HACC Dr. Harrisburg, PA 17110-2999
(9)	Neumann University Continuing Education Dept. 1 Neumann Dr. Aston, PA 19014-1298	Thursday	11-18-2010	Allison Jones (610) 358-4580 jonesa@neumann.edu	Neumann University Thomas A. Bruder, Jr. Life Center Bldg. 1 Neumann Drive Aston, PA 19014
(10)	Penn State University 1600 Woodland Rd, Abington, PA 19001	Wednesday	12-15-2010	Theresa Bloom (215) 881-7402 tmb17@psu.edu	Penn State University Abington Campus

## News and Views...(cont.)

### Questions about the new tax preparer registration requirements

by George J. Meyers, EA

Much has been, and will be written about the **Proposed New Requirements for Tax Return Preparers**.

Beginning in 2011, tax return preparers who prepare all, or substantially all, of a Federal tax return (for compensation) will be subject to new requirements including:

- Registration
- Testing
- Continuing Education

We Enrolled Agents will now be in competition with **Registered Tax Return Preparers!**

Major tax preparation firms whose employees have undergone competency testing and met continuing education requirements will be able capitalize on their large scale ability to market them-

selves.

How can Enrolled Agents practicing alone or as smaller full service practices compete with national tax services with their Super Bowl size advertising budgets and an army of employees newly designated as **Registered Tax Return Preparers?**

Will NAEA insure that the public perception of the difference between **Enrolled Agents** and **Registered Tax Return Preparers** is more than a mere distinction?

**What is the future of the Enrolled Agent? Our future?**

First let's be clear what the new tax preparer requirements are. The practice of the new category of preparers will be limited to preparing tax returns for compensation and representing taxpayers in ex-

amination when the return under examination is a return that they prepared. This is no different than the current rules for unenrolled preparers.

**The practice of enrolled agents before the IRS is not limited!**

Only Enrolled Agents, CPA's and Attorneys may represent taxpayers before the Collections Division of the IRS as well as Appeals.

**We Enrolled Agents are THE APPEALS or REPRESENTATION pros and must be perceived as such by the taxpaying public!**

If you have not attended the NAEA's **National Tax Practice Institute**, now is the time. Sharpen your representation skills. Representation is our future! It's the way Enrolled Agents distinguish themselves!

### Freedom of Information Act and Privacy Act Requests

Reader Craig Argo, EA forwarded the following information from Narina Bchtikian of the IRS Liaison Stakeholder's office:

#### **Do You Submit Freedom of Information Act Requests?**

The Internal Revenue Service is pleased to announce the modernization of Freedom of Information Act (FOIA) and Privacy Act case processing. If you are a practitioner who submits these requests on behalf of your clients, it is important that you know what this means to you.

The Office of Disclosure processes FOIA and Privacy Act requests for tax information. Disclosure will begin using a new software imaging application that will:

- Centralize receipt and control of requests
- Allow more efficient processing of requests
- Allow even distribution of FOIA requests throughout the country

The implementation of this automated processing, called AFOIA, is an initial step towards compliance with President Obama's open government initiative.

IRS will phase in the Northeast part of the country beginning September 27, 2010.



*"A popular government, without popular information, or the means of acquiring it, is but a prologue to a farce or a tragedy; or, perhaps, both."*

- Pres. James Madison,  
August 4, 1822

## News and Views...(cont.)

Effective August 23, 2010, requests previously sent to Northeast Area Disclosure Offices in Connecticut, Delaware, Massachusetts, Maine, New Hampshire, New Jersey, New York Pennsylvania, Rhode Island, and Vermont should go to:

Internal Revenue Service  
Disclosure Scanning Operation  
2385 Chamblee Tucker Road  
Stop 93A  
Chamblee GA 30341

The attached Disclosure mailing address list contains the latest information for all states. Please continue sending requests for records to the office addresses shown. We will revise the mailing list as AFOIA is implemented in the remaining states.

From September 13 - 24, 2010, Northeast Area Disclosure employees will be transitioning to the new software and there will be brief periods of unavailability. For urgent Disclosure matters during this time, please contact the local [Stakeholder Liaison](#) office for routing of your request.

### Attending NTPI 2010: A Firsthand Account *by Roxanne Witmer, EA*

The 2010 NAEA National Conference in Las Vegas, Nevada was excellent. From the opening Plenary session on Sunday with Janine Driver to the graduation presentation on Tuesday evening, everything seemed to run smoothly. I attended the Level 3 sessions and found excellent, experienced presenters with highly informative discussions on current representation issues.

Janine Driver was mesmerizing – her presentation challenged us to really pay attention to our clients and not to pre-judge people without knowing their ‘baseline’ behaviors. She held the audience’s attention with a fast-paced talk and lot’s of audience participation. Even the skeptics in the audience were on board by the end of Janine’s talk.

The NTPI education sessions were very well done, with excellent topics relevant to today’s tax practice and representation issues. Sessions included Ethical Dilemmas, Appeals, Correcting Bad Actions of Clients, Trust Fund Issues, and Income & Expense Reconstruction for Non-Filers. I went away with the thought that it’s a scary practioner environment out there but with education and confidence, EA’s can be the go-to professionals of choice for taxpayers when dealing with the IRS.

Overall, the conference left me with the feeling that while many changes are on the horizon for our profession, EA’s have a golden opportunity to grow their businesses and expand their representation services.

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*“Could you loan me ten dollars but just give me five? That way you’ll owe me five, I’ll owe you five, and we’ll be even.”*

Diane Lim Rogers, guest blogger Christian Science Monitor on US Tax Policy



## Introducing the Board...

Please join the PSEA board in welcoming our two new directors. Lisa McAllister, EA was introduced as a candidate in the May newsletter, but was officially affirmed at the Annual Meeting. Joining her is Joni K. Cappuccio, EA, CPA, nominated and voted in from the floor of the Annual Meeting. We're very pleased to have them both join the team and look forward to their contributions to our growing organization.

### **Joni K. Cappuccio, EA, CPA**

Joni has been a tax and accounting professional for 25 years. She is currently a self employed practitioner in Morrisville, specializing in individuals, small businesses and nonprofit organizations. Joni holds a BS in Accounting from Trenton State College and is currently pursuing her MST. An Enrolled Agent since 1993, she looks forward to working with the Board of PSEA to support the needs of Enrolled Agents in PA. In her spare time, she enjoys swimming, dancing, reading and riding extreme coasters. Joni and her husband, Felice, reside in Morrisville with two daughters, Felicia and Kelli.

### **Lisa McAllister, EA - nominated for Director**

Lisa has more than 15 years of experience in public accounting and industry. She has worked with a wide spectrum of clients, including individuals, multistate corporations and expatriates. She has assisted clients with tax planning, estate tax minimization, reviews, dispute resolution and due diligence. Currently the Tax Manager at Spring Mill Partners, Lisa works with a wide variety of clients with a primary focus on tax planning and compliance for high net worth individuals and family offices. Lisa serves as the external controller for a multi-million dollar privately held business, handling all of the financial and tax matters. In 2009, Lisa successfully completed the Special Enrollment Examination earning the privilege to represent taxpayers before the Internal Revenue Service. Lisa is a member in good standing of the National Association of Enrolled Agents and the Pennsylvania Society of Enrolled Agents. She is enthusiastic about her EA designation and seeks to further educate both her clients and the public at large about the important role Enrolled Agents play in dealings with the Internal Revenue Service. Lisa graduated magna cum laude from Philadelphia University, receiving her Bachelor of Science in Accounting. She currently resides in Fort Washington with her husband Michael and their five year old twin daughters Cathryn and Danielle. Current hobbies include drawing in the driveway with chalk and playing with Play Doh.

## Editor's Notes...

Some recent changes in my life have made me realize that I need to start delegating some of the newsletter tasks. This summer my husband and I found ourselves catapulted into the sandwich generation, as we dealt with parents facing major surgeries even while our own children were going through major life changes and needed us to be available to them too. So I'm asking for assistance in collecting content for the PA EA Alert.

As usual any articles that members can contribute, especially in regards to PA tax treatment are extremely welcome. In addition to that, I'm looking for some members who can assist me with parsing through IRB's, the PA tax update and the NAEA E@lerts to pull out information that would be of interest to our membership. These don't have to be comprehensive, just a scattering of vital pieces of information that are of specific benefit to Enrolled Agents in general and especially those who are involved with the management of a tax and or representation practice.

If you're interested and willing, please let me know at [pa.enrolledagents.nl@gmail.com](mailto:pa.enrolledagents.nl@gmail.com). The next newsletter is published during the month of November, so please submit any articles by October 31 for consideration.

To ensure that this quarterly newsletter won't be rejected as spam, please include [pa.enrolledagents.nl@gmail.com](mailto:pa.enrolledagents.nl@gmail.com) in your address book. This email is used for distribution purposes and communication with the newsletter editor only. If your personal or business information including email address has changed, please contact [Samantha Stewart](#) to update your information.

Michelle Long, Editor

**PENNSYLVANIA SOCIETY OF ENROLLED AGENTS**

**ANNUAL MEETING**

**JUNE 14, 2010**

**STATE COLLEGE, PA.**

President Linda Bleil called the meeting to order and welcomed the members. She led the group in the Pledge to the Flag. Linda introduced all the past Presidents then introduced Al Thompson from the NAEA PAC.

Mr. Thompson noted that the changes coming in the next year with OPR are dramatic and the Government Relations Committee at NAEA was working with the Director of OPR to deal with some of these changes. NAEA's PAC is trying to raise \$30,000 for the PAC. All transactions are fully transparent with every donation and transaction reported. The donations can come from individuals only and are limited to a maximum of \$100 up to \$5,000 per year. They are not tax deductible.

Linda Bleil reported that thus far, we had collected \$665 from the members for the NYSEA and that we would still be collecting on Tuesday.

She reported on the progress of the organization during the last year and asked for a round of applause for the Board. Our mission is to offer good quality education at the lowest possible cost to the membership. All seemed to want to include the required two hours of ethics. She asked the group for help in accomplishing our goals, especially if they have any particular areas of expertise that they could share through newsletter articles. We can expect an influx of members due to the new registration regulations so that will present some new challenges. She then asked the two Vice Presidents to come to the podium.

First Vice President: Samantha Stewart thanked the group and asked them to share their thoughts with us on how to improve the society and better serve them.

Second Vice President: Mary Ann Jesse echoed Samantha's remarks emphasizing that we are not a clique but an association and we welcome remarks and suggestions from all members.

Secretary: Kathryn McCusker noted that copies of the minutes from the last annual meeting had been distributed. Al Whitcomb moved that the minutes be approved as read and Terry Cosentino seconded the motion, which passed unanimously.

Treasurer's Report: Lynda Moscatello noted that copies of the Treasurer's report had been distributed. We have approximately \$29,000 in the bank with about \$12,000 of that in our checking account and the balance in a Money Market Account. We expect to have expenditures of \$17,500 to \$18,500 for the 2010 Feast. We have been operating the fEAST at a loss in the past but that trend cannot continue. We hope to be able to operate the Feast on a break-even basis in the future. Mark Thomas moved to accept the Treasurer's report and Al Whitcomb seconded the motion. All voted in favor.

Newsletter: Linda Bleil reported that our newsletter editor could not be with us due to family medical issues and asked that we remember her at this time. We will be issuing one paper newsletter each year and the rest will be electronic.

By-Laws: No report.

Budget Committee: Lynda Moscatello presented the budget which had been approved by the Board of Directors. She said it was a net/zero budget, spending only what we took in. There was a bit of an increase in the newsletter budget and we hope to be able to do online registration for the 2011 fEAST of the EAst. Donnie Boyer asked about the previously proposed Gettysburg workshop and was informed that it was not feasible at this time. If we do schedule one in the future, we will need volunteers. Gary Rothermel moved to accept the budget as presented and Donnie Boyer seconded the motion which passed unanimously.

Government Relations: William Matesevac reported on the Western Working Together workshop which will be held on September 23, 2010. He said it was a good program and suggested interested parties register early. George Meyers reported on the Eastern

Working Together which was held on May 17, 2010. It was noted that those who registered as PSEA members can get a \$25 reimbursement for the Working Together workshops upon submission of proof of attendance.

Membership: Samantha Stewart reported on activities of the group to recruit new members and retain the old ones, noting that there are 781 Enrolled Agents in Pennsylvania that do not belong to PSEA. We have participated in the NAEA membership challenges and contacted all new Enrolled Agents as we receive their names. She asked the group to help get our name out there to other Enrolled Agents.

Nominations: The Nominations Committee presented the following slate of officers and directors to be considered for election:

President - Linda Bleil; First Vice President – Samantha Stewart; Second Vice President – Mary Ann Jesse; Secretary – Kathryn McCusker; Treasurer – Lynda Moscatello; Directors: Joan Hoover, Diana Dugan, Michelle Long, Willie Nelson, Aaron Shirk, Roxanne Witmer, and Lisa McAllister. The Committee asked for nominations from the floor. William Matesevac nominated Joni Cappuccio for Director. Samantha Stewart seconded the nomination. Mark Thomas moved that the nominations be closed. Terry Cosentino seconded the motion which passed unanimously. Mark Thomas moved that all those that had been nominated be elected by a unanimous vote cast by the Secretary. Donnie Boyer seconded the motion which passed unanimously.

Terry Cosentino installed the officers and directors.

Linda Bleil announced that the dates for the 2011 Feast of the East were set for June 13 and 14, 2011 at the same location.

Old Business: There was no old business raised.

New Business: There was no other new business raised.

Good of the Order: On behalf of the past Presidents, Donnie Boyer expressed thanks to the Board of Directors for the good job they had been doing.

Terry Cosentino moved that the meeting be adjourned and Emily DeWald seconded the motion. The meeting was adjourned at 6:45 p.m.

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## fEAsT 2010 prize winners...

Usually we have a little spread of fEAsT photographs and some of the highlights. This year your publications chair missed the fEAsT due to some health concerns of family members, but the board was kind enough to track the winners of our door prize winners. Congratulations to the winners of following:

**PSEA Canvas Bags:**

Dianne Adamitz  
Roberta Delia  
Charles Dinan  
Sheryl Hendricks

Richard Troese

**Gift Baskets:**

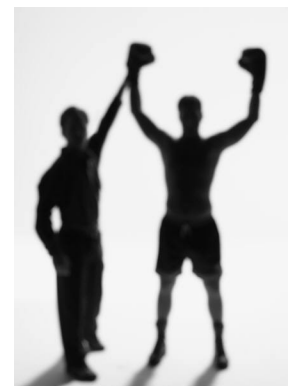
Kelly Kozell  
Bonnie Lewis

**Staples Gift Cards:**

Mary Bolt  
Susan Solt

**And the grand-prize winner of a fully paid registration for fEAsT 2011 was:**

William Tomlinson



**Pennsylvania Society of Enrolled Agents  
Profit & Loss  
July 2009 through June 2010**

	<u>Jul '09 - Jun 10</u>
<b>Ordinary Income/Expense</b>	
<b>Income</b>	
Dues Income	15,265.00
FOE	13,795.00
Initiation Fees	162.00
Interest Income	106.55
<b>Total Income</b>	<u>29,328.55</u>
<b>Expense</b>	
Board Meeting	8,097.11
Depreciation & amortization exp	150.00
Education	150.00
FEAst	19,318.15
Government Relations	1,634.80
Membership	376.99
NAEA Meetings	500.00
Office Supplies	64.23
Postage	55.37
Telephone	238.03
Website	293.40
Working Together	675.00
<b>Total Expense</b>	<u>31,553.08</u>
<b>Net Ordinary Income</b>	<u>-2,224.53</u>
<b>Net Income</b>	<u><u>-2,224.53</u></u>

**Pennsylvania Society of Enrolled Agents  
Balance Sheet  
As of June 30, 2010**

	<u>Jun 30, 10</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
Checking/Savings	
PNC Checking	663.55
PNC Money Market	8,158.08
<b>Total Checking/Savings</b>	<u>8,821.63</u>
<b>Total Current Assets</b>	8,821.63
<b>Fixed Assets</b>	
LCD Projector	597.99
<b>Total Fixed Assets</b>	<u>597.99</u>
<b>TOTAL ASSETS</b>	<u><u>9,419.62</u></u>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Equity</b>	
Unrestrict (retained earnings)	11,644.15
Net Income	-2,224.53
<b>Total Equity</b>	<u>9,419.62</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><u>9,419.62</u></u>

## Pennsylvania Society of Enrolled Agents FEAsT of the EAst 2010 All Transactions

	<b>2010 FOE</b>
<b>Ordinary Income/Expense</b>	
<b>Income</b>	
<b>FOE</b>	
Attendee Registration	11,715.00
Donations for Others	1,400.00
Guest Registration	385.00
Product Sales	220.00
<b>Total FOE</b>	<b>13,720.00</b>
<b>Total Income</b>	13,720.00
<b>Expense</b>	
<b>Board Meeting</b>	
Travel	2,920.50
<b>Total Board Meeting</b>	<b>2,920.50</b>
<b>FEAsT</b>	
Attendee Fees	10,314.18
Donations to Others	1,400.00
<b>Instructor</b>	
Fees	1,620.00
Incidentals	4.00
Meals	100.00
Travel	1,134.94
<b>Total Instructor</b>	<b>2,858.94</b>
Printing	1,834.82
Promotional	1,949.98
<b>Total FEAsT</b>	<b>18,357.92</b>
<b>Total Expense</b>	<b>21,278.42</b>
<b>Net Ordinary Income</b>	<b>-7,558.42</b>
<b>Net Income</b>	<b>-7,558.42</b>



From left to right: Enrolled Agents Lynda Moscatello, Diana Dugan, Joan Hoover (back row), Linda Bleil, Roxanne Witmer (back row), Edward Sulkoske, Joni Cappuccio, Samantha Stewart, Willie Nelson, Lisa McAllister, Kathryn McCusker (back row), Mary Ann Jesse, and Aaron Shirk.

Your PSEA Board works hard to provide you with the 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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