

# Florida Society Of Enrolled Agents

Broward Chapter Newsletter

Issue: July, 2009

## **PRESIDENT'S CORNER**

**DEAr** Members:

Thank you to Felix Perez who is doing an outstanding job as our Education chairman. The meeting on June 2nd on QuickBooks was a huge success. We not only has a gr**EA**t sp**EA**ker, but, we also received 2 hours CPE for the same cost as 1 hour. This may have been the largest seminar we have ever had with an attendance of 50 people.

The FSEA convention was superb. There were 13 Broward Chapter members who attended of which 5 were the first time. CPE was gr**EA**t and the Broward Chapter had fun at the annual banquet. Next y**EA**r, the convention will be in Orlando. We hope to see you there.

We will have a drawing for the IRS Forum which will be August 4-6, 2009 at the Carib Royale in Orlando. You must be present to win.

Our website is going to have a classified section. You can post your ads on the website –**FREE OF CHARGE**. The ad will stay for 90 days. If you need it to continue, you will need to resubmit your request. All ads must be submitted to the president of the chapter.

Sp**EA**king of chapter president. I have been the chapter president for 3 y**EA**rs. I have enjoyed the opportunity to be president, however all gr**EA**t organizations need change. At our July meeting, Duane Siers will be installed as the new president, Felix Perez as Vice-President, and Donna Smith as Education Chairwoman. Karen Martin and Debbie Heyer will stay on as Secretary and Tr**EA**surer respectively.

A special thank you to Mike San Miguel and Howard Wechsler for their time and effort putting a new board together. To all board members who have served with me – I could not have done it without you. For the members who have never served on the board...you are missing a wonderful opportunity.

As always, I look forward to seeing you on July 7<sup>th</sup>, 2009. Have a Happy and safe 4<sup>th</sup> of July and...remember to bring a coll**EA**gue.

Joanne L. Wood, EA  
President

### **Next Meeting -**

#### **Colony West Country Club**

6800 N Pine Island Rd. Tamarac, FL 33321  
954-722-9605

**July 7th, 2009**

**SPEAKER: Barry Rabinowitz, EA**

**TOPIC: 529 Plans-All you want  
to know**

#### **TIME:**

**12:00 P.M. - 1 Hour CPE**

#### **COST:**

Members: \$19.00

Guests: \$25.00



**Mark Your Calendars ! 2009 Future Meetings...**  
**August 11<sup>th</sup>, 2009 \* September 1<sup>st</sup>, 2009 \* October 6<sup>th</sup>, 2009**

**TAX QUOTE**  
**Of the Month**  
**- July, 2009 -**

**“Alimony is like buying hay for a dead horse”.**

**- Groucho Marx, Am. Comedian - 1895-1977**

# Florida Society Of Enrolled Agents

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## June, 2009- Financial Report from Treasurer - Debra A. Heyer, EA



Beginning Bank Balance May 31st, 2009

6318.61

5,891.52

### INCOME

|                       |          |          |
|-----------------------|----------|----------|
| Annual Renewal Income | 1,887.50 | 2,812.50 |
| Monthly CPE Income    | 1,004.00 | 8,037.00 |
| Donation Income       | 0.00     | 17.00    |
| Quickfinder Income    | 0.00     | 3,052.00 |
| 50/50 Ticket Income   | 43.00    | 407.00   |

**Total Income**

**2,234.50**

**Fiscal YTD**

**14,325.50**

### EXPENSES

|                                 |              |               |
|---------------------------------|--------------|---------------|
| Awards and Recognition Expense  | 86.00        | 290.92        |
| Cost of Goods Sold              | 0.00         | 3,007.44      |
| Postage and Delivery            | 10.08        | 28.14         |
| Office Supplies                 | 0.00         | 75.89         |
| Speaker Gifts/Honorariums       | 90.00        | 416.75        |
| Advertising/Promotions          | 0.00         | 250.00        |
| Charitable Donations            | 0.00         | 17.00         |
| Website and Domain Expense      | 74.00        | 248.95        |
| Luncheon Expenses (Monthly)     | 950.82       | 8,272.64      |
| 50/50/ Ticket Expenses Paid out | <u>23.00</u> | <u>206.00</u> |

**Total Expenses**

**1,149.82**

**12,813.73**

Ending Bank Balance June 30<sup>th</sup>, 2009

\$7,403.29



**Happy Birthday America!!  
Have a safe July the 4<sup>th</sup> celebration!!**



**To our very own out-going President,  
Joanne L. Wood, EA. At the FSEA Annual  
Convention, Joanne was the recipient of the FSEA  
Leadership Award. This award was presented for  
outstanding leadership and excellence.  
Congratulations, Joanne!!**



***EXTRA ... EXTRA...– READ ALL ABOUT IT – RIGHT HERE IN YOUR CHAPTER’S NEWSLETTER!***

If any member has something they would like “published” in our monthly newsletter, e-mail Karen Martin at [KEMartinEA@aol.com](mailto:KEMartinEA@aol.com). Perhaps, someone is looking for extra help in their office, someone received special accolades for a “job well done” or you know of any seminars that might be of interest to any of our members, or, someone might be interested in buying or selling their practice. Get the info to me as soon as possible before I e-mail everyone (Generally, the week before our meeting). It will remain on the [www.fseabc.org](http://www.fseabc.org) website for 90 days unless otherwise instructed. I am looking forward to hearing from you!!

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**REMINDER.....** Please check your certificates. We hand them out at each meeting. If you are missing any, please e-mail me at [KEMartinEA@aol.com](mailto:KEMartinEA@aol.com) and I will bring them to you at the next meeting.

Our annual FSEA Broward Chapter dues is due on July 1<sup>st</sup>, 2009. The cost is \$25.00 (the same as last year). PLEASE fill it out and return to me with your check. For those of you who sent the applications and your dues... **we thank you!!**

It is necessary that we have any and all updated information on our Broward members. This goes on the website, as well. So let the website do some marketing for you and your business!!

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**The August, 2009 issue of the Broward newsletter will reflect the change in officers and CPE Consultant.**

**Karen Reinagel, our new FSEA President, will be at our meeting and do the honor of swearing in our new Board members.**

# Florida Society Of Enrolled Agents

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Don't forget to check out our very own website and RSVP to the upcoming meetings at [www.fseabc.org](http://www.fseabc.org). All upcoming information is posted there... including the speakers!!! If you have a problem logging onto the website – e-mail Felix Perez, EA at [fdpconsultinc@bellsouth.net](mailto:fdpconsultinc@bellsouth.net).

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## **Officers:**

|                |  |                |                  |   |
|----------------|--|----------------|------------------|---|
| President:     | Joanne L. Wood, EA   | (954) 969-1566 | * Coconut Creek  | * |
|                | <a href="mailto:joanneEA@aol.com">joanneEA@aol.com</a>           |                |                  |   |
| Vice-President | Frank Cumberbatch,EA   | (954) 742-5930 | * Lauderhill     | * |
|                | <a href="mailto:frankcum@aol.com">frankcum@aol.com</a>           |                |                  |   |
| Secretary:     | Karen E. Martin,EA   | (954) 328-8237 | * Margate        | * |
|                | <a href="mailto:KEMartinEA@aol.com">KEMartinEA@aol.com</a>       |                |                  |   |
| Treasurer:     | Debra A. Heyer ,EA   | (954) 441-1404 | * Pembroke Pines | * |
|                | <a href="mailto:debbie@ourtaxteam.com">debbie@ourtaxteam.com</a> |                |                  |   |

**Website Info:**    **Our Broward Chapter**    -    [fseabc.org](http://fseabc.org)  
                          **Florida Society (state)**    -    [fseonline.org](http://fseonline.org)  
                          **National Association**    -    [naea.org](http://naea.org)

**Broward Chapter website maintained by our own webmaster...Susie D'Leon, EA**

Publisher: Karen E. Martin EA \* [KEMartinEA@aol.com](mailto:KEMartinEA@aol.com) \* Cell: (954) 328-8237 \* Fax: (954) 344-0273