

GREATER DAYTON CHAPTER OF THE OHIO STATE SOCIETY OF ENROLLED AGENTS AFFILIATE OF THE NATIONAL ASSOCIATION OF ENROLLED AGENTS

Members Enrolled to Represent Taxpayers Before the Internal Revenue Service

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Meeting the third Thursday of each month (May thru November) at Frickers at 6280 Chambersburg Rd, Huber Heights, OH

Minutes of the August 18, 2011 Meeting

The meeting was called to order at 6:10 p.m. by Bob Sharp, President.

There were 17 members and 3 guests (in addition to the speaker) in attendance for tonight's education.

Ron Bodey moved and Fred Kreuzer seconded, that the minutes of the July 21, 2011 meeting be approved. The motion carried, by voice vote.

Per the Treasurer's report, the bank balance is \$1,134.90.

Don Jump, our chapter representative, gave an update of recent events, including:

- This Saturday (August 20, 2011) is the last day to get the group rate for rooms at the upcoming state conference.
- You need to register for the conference by August 30, in order to get the discounted registration price.
- An email went out recently asking for help at the conference. This would be in the form of picking up speakers at the airport and getting them to/from Hueston Woods, helping at the registration desk, manning the hospitality room, etc. Door prizes are also need for the raffle.

There was no Old Business to discuss.

Bob Sharpe mentioned a number of items, including:

- the article that was printed in the Dayton Daily News, on Sunday, August 7, 2011, listing the recently elected officers and promoting the chapter.
- the Energy Credit was renewed for the 2011 tax year but it is limited, as compared to what was available in prior years.
- the University of Dayton is presenting a seminar for \$69, about retirement planning.
- Ohio will be pursuing businesses for Use Taxes not previously reported.
- the 2-year limitation for requesting Innocent Spouse relief has been lifted.

John Tishaus had flyers available for the upcoming PTI.

Joanne Numbers commented on several items that were mentioned by last month's speaker and with which she took issue:

- assets titled as POD or as TOD will avoid probate, and
- while assets that are probated are public record, the estate tax returns are not public record.

Our speaker was introduced at 6:40 by Fred Kreuzer.

After the speaker finished his presentation, tonight's visitors were introduced.

Hal Nielson moved, Bruce Brenner seconded, and the meeting was adjourned at 8:04 p.m.

Respectfully Submitted,
Bruce Brenner, EA
Secretary, Greater Dayton Chapter of OSSEA