

National Association of Enrolled Agents
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Ohio State Society of Enrolled Agents
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Greater Columbus Chapter
4290 Indianola Avenue # 203, Columbus, Ohio 43214
Phone (614) 267-3676 chaptermail@aol.com

Notice of Regular Monthly Meeting

Date: October 13, 2011 (Thursday)

Time: 6:00 - 6:15 roundtable discussion 6:15 - 7:15 dinner & business meeting 7:15 - 8:05 education

Costs: Dinner and education: \$25 for members; \$32 for nonmembers.

Education only: \$2 for members; \$7 for nonmembers.

Roundtable discussion: You contribute to the agenda. E-mail cases and questions you'd like to discuss to lvbook.tax@gmail.com.

Education: Sandra L. Grant, ChFC, CASL, CSA, PDMM, will discuss tax aspects of Social Security and Medicare. Participants will receive 1 hour CPE in taxation. This will be in the format of a brief presentation with an open forum for questions regarding this topic. If you would like to have your questions presented in advance, please forward them to Nancy Campbell, at preparer@parkertax.net.

The IRS Office of Professional Responsibility recognizes the Greater Columbus Chapter of the Ohio State Society of Enrolled Agents as CPE sponsor # 220.

(From Sandra Grant:)

Summary of Presentation:

- Overview of Social Security and explanation of why Social Security benefits are subject to taxation
- The two most often confused Social Security tax related issues: the reduction in Social Security benefits vs. the taxation of Social Security benefits.
- How to determine the portion of benefits subject to federal income tax: provisional income vs. base amount.
- Strategies to help your clients maximize Social Security income while minimizing taxes: when to start taking benefits, spousal benefits and MFS vs. MFJ
- How income impacts the cost of Medicare and how Medicare expenses can impact income: a discussion of Medicare Part B
- Other useful information to benefit you and your client: Ohio specific issues and additional resources.

Additional Certification Information:

ChFC: The Chartered Financial Consultant designation is a financial planning

designation awarded by the American College of Bryn Mawr. ChFCs must meet experience requirements and pass exams covering finance and investing. They must have at least three years of experience in the financial industry, and have studied and passed an examination on the fundamentals of financial planning, including income tax, insurance, investment and estate planning.

CASL: The Chartered Advisor for Senior Living designation is awarded by the American College of Bryn Mawr. The CASL credential is for individuals who typically work with seniors as a normal course of their business practices. The CASL designation imparts the training, understanding, and knowledge that enables certificants to address the main concerns of this senior demographic – areas such as the financial, health, psychological and sociological issues that seniors face.

CSA: The Certified Senior Advisor designation is awarded by the Society for Certified Senior Advisors. The CSA designation supplements financial and medical professional licenses, credentials and education with a broad-based knowledge about the health, financial and social aspects and issues of aging. CSAs have proven knowledge that will enable them to identify seniors' needs and issues, understand how seniors' values and motivations affect their choices, and how to communicate appropriately and compassionately with seniors, as well as be a valuable resource. The CSA designation is accredited by the National Commission for Certifying Agencies (NCCA).

PDMM: The Professional Daily Money Manager designation is awarded by the American Association of Daily Money Managers (AADMM). The AADMM is a national membership organization representing individuals and businesses in the growing profession of daily money management. PDMMs must demonstrate knowledge in five areas of competency that include bill paying, basic finance/bookkeeping, payroll and tax basics, types of expenses, and standards of practice. These professionals provide personal financial/bookkeeping services to senior citizens, the disabled, busy professionals, small businesses and others.

- On or before Thursday, October 6, please do one of the following:
- A) E-mail your reservation to lvbook.tax@gmail.com. (new e-mail address!) (*This is the preferred method.*)
 - B) Phone your reservation to 614-754-0673 and provide your own phone number. *E-mail simplifies the response process.*

All reservations not honored will be billed, so be sure to notify Lisa Vivens on or before Thursday, October 6 if you must cancel your reservation. If you think you have a reservation but have not gotten a confirmation of it, be sure to notify Lisa Vivens on or before Thursday, October 6. Lisa will call the Fawcett Center with our reservations on Friday, October 7. Any changes after Lisa's Friday, October 7, call to the restaurant will incur a \$5 fee by the facility, for which the changer will have to reimburse us.

If you reserve a dinner but are not here by 6, we will try to sell your dinner to an unexpected diner.

If no such person shows up, we will bill you for the dinner, since the Fawcett Center will bill us.

Getting there: It's just north of Lane Avenue, one block from 315.

What's for dinner:

slow roasted pork loin, bacon and chive, mashed potatoes, asparagus with yellow squash and peppers, plus baby field greens, balsamic dressing, Italian dressing, and bread,

or

cheese-filled tortellini, asparagus with yellow squash and peppers, plus baby field greens, balsamic dressing, Italian dressing, and bread