



President's Message



I traveled with Eunice Malkasian, EA, to Arlington, Virginia for the affiliate president exchange meeting (APEX) hosted by NAEA on November 12 and 13. It was a wonderful opportunity to meet other state leaders and share ideas. One of the highlights for me was listening to our guest speaker, IRS Commissioner Douglas Shulman. Commissioner Shulman discussed the licensing of tax preparers and his focus on high wealth taxpayers.

By the end of this year, Commissioner Shulman plans to give his licensing recommendations to President Obama and Treasury Secretary Geithner. He mentioned two key points that will be part of his recommendations. Every tax preparer needs to be credentialed. And, there will not be any added requirements for Enrolled Agents, since we are already regulated by Circular 230. It will be interesting to see what his final proposal includes.

Commissioner Shulman also shared that he is in the early stages of forming a global high wealth group. This group will take a global view of high wealth taxpayers with more than \$30 million in assets. For this set of taxpayers, the IRS will not only look at the 1040, but all the complex legal arrangements (e.g., trusts, rents/royalties, privately-held corporations) associated with that 1040.

Back on the home front, I want to highlight two educational seminars we have planned. Our famous January 1040 Update will be held on January 9, 2010 at the Best Western Hotel in Waltham. If you haven't signed up yet, go to our website, www.maseaonline.org for more details. This is a great way to get 8 CPE credits and all the tax updates you need to start your tax season. And, mark your calendar for June 12, 2010 to attend our MaSEA annual meeting and conference. The June convention committee has been working hard to plan a great event for you at the Resort and Conference Center at Hyannis. You will receive 8 CPE credits taught by nationally recognized speaker, Beanna Whitlock, EA, CSA. Make a weekend of it and enjoy Cape Cod before the summer crowds totally take over Hyannis. Go to our website for more details.

This is your last chance to sign up for the 2010 MaSEA SOS program. The deadline is December 31, 2009. To sign up, fill out the Contract and the Contact Information documents. They can be found under the SOS Program link on our website. Fax these two forms to Terry Durkin at 978-535-8953. This is our second year running this formal program designed to protect the value of our individual practices during periods of incapacity. This program is meant to be a short term solution to provide support to an ailing MaSEA colleague. To be in the program, you are required to sign up each year.

I look forward to seeing you at our upcoming monthly meetings at the Marriott Newton. And, don't forget, if you can't travel to the meeting, we have teleconferencing capability available for the monthly meetings. Just call the office to sign up.

I thank all of you volunteers who have put so much time and energy into our association. I am so honored to be representing MaSEA. I wish you all a peaceful and joyous holiday season and a healthy and prosperous New Year.

Terry Durkin, EA, MBA
MaSEA President



Inside this issue:

Minutes of the November BOD Meeting	2
Interviews With the Board	3
My Experience With Teleconferencing	3
You Can Offer What the IRS Can't	4
Coming Events	5
Getting Ready for the New Privacy Law	6-8
Meeting Highlights for November	8
List of Officers	3



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MINUTES OF THE BOARD MEETING, NOVEMBER 19, 2009

Board Members:

Present: Sarkis A. Babikian, Kay Cassidy, Theresa Durkin, Janet Foote, Stephen B. Jordan, Ralph Macdonald, Eunice A. Malkasian, Alice M. McElhinney, Joyce Mohr and Shantilal T. Patel.

Absent: Randy F. Hull, Jr.

Guest(s): William Ross, Barbara Wirkala

Quorum present? Yes

Proceedings:

Meeting called to order on Thursday, November 19, 2009 at 3:27 pm by President and Chair, Terry Durkin.

October 22, 2009 meeting minutes were reviewed. No further corrections noted, approved by President and Chair Durkin.

Treasurer's Report provided by Treasurer Janet Foote:

Foote reported the Financial Statements for the four-month fiscal period ending October 31, 2009. Overall, Foote noted, the Society's Fiscal YTD total gross income was \$35,830, an unfavorable variance to budget of \$(8,994) or 20.07% of budget noting that the variance is skewed by the SEE program (see notes below) and an unfavorable variance to the preceding year of \$(6,705) or (15.76)% due in part to the change in how NAEA reimburses MaSEA for memberships. Membership revenue is now reimbursed on a rolling membership instead of Annually in July/August. This alone reduced income for the first 4 months over last year by \$6,261. In spite of these changes, Foote noted the Society's Fiscal YTD net income was \$11,272.



Continued on page 9

Interviews with the BOD....by Randy Hull, EA

Terry Durkin EA, President

Favorite Sports Team: My Newton girls basket ball team
Last Book read: A Great & Glorious Game by A Boratt Giamahi

Favorite Vacation place you have been to more than once: Cape Cod

Favorite Vacation place: Alaska

Most recent movie seen in Theater: The Departed

Sports or Activity which you do today: Coach of Girls Basketball Team

Favorite Sports Stadium/

Arena: Coors Field

Sports Activity you have done in past: College Basketball & Softball

Favorite Food: Ice Cream

Favorite Quote: "Good, Better,

Best Never let it rest until the good becomes better and the better becomes best"

Number of States you have been in: 42

Other: I have caught the Golf Bug!



Favorite Pet: Great Dane Mix, color Bridle name Kobi

Sports or activity I do today: Sailing

Sports activity done in the past: Boogie Boarding

Favorite Food: Eggplant Parmesan

Number of US States visited: 23

Other: Co-founder Acacia in Kenya a community outreach project in 2005

.....watch for more in the next Briefcase.

ATTENDING MEETINGS BY PHONE...

MY EXPERIENCE WITH TELECONFERENCING

BY Mike Frasier, EA

After twenty-six years of preparing tax returns, I decided to go for my enrolled agent's designation. Massachusetts Society of Enrolled Agents sent me a pamphlet in 2006 for a summer preparation course at Middlesex Community College, only about half an hour from my house. In 1994, I had taken the two day test after studying for six months, passing two of the four test sections, but did not have the time to complete the other parts and lost the credit. Congress proposed that tax preparers be licensed and I knew that to continue in the business, becoming an enrolled agent was a necessity.

Thanks to Lorene Beach and all the great instructors from the course, I passed in January 2008 and was admitted as an enrolled agent in April 2008. The many hours of study and taking the Corporation section twice were worth it. I was determined to maintain my enrolled agent status. The EA Journal has some great articles and the 2-4 CPEs from the tests are convenient reading on the weekends. The problem with attending the MaSEA monthly meetings is that I work late with my day job in computer field service and can't always be on time.

The perfect solution for me is to attend the meetings via conference call. My day job consists of many conference calls with customers and management. MaSEA's teleconferencing feature has made maintaining CPE requirements much easier. Since the calls were implemented in the fall of 2008, I have "attended" every meeting and the call quality has definitely improved. The handouts from the speakers are sent via email prior to the meeting so you can follow along with ease. I take the call in my home office so there are no distractions. There are ample opportunities to ask questions. Along with the handouts come the speaker evaluation forms, which I forward to Terry Durkin or Kay Cassidy by email or fax after I have provided the feedback. The Certificate of Completion for CPE arrives in my email after the meeting. I print it out and file it as if I attended the meeting in person.

One of the drawbacks is that I don't see the Society members face to face, which hinders building relationships. Until I can spend more time with my tax business and MaSEA, the monthly conference call works for me. Join me "on the call" in the future!

Janet Foote EA,

Treasurer

Year Make Model Color of First

Car: 1978 Datsun B-210 Brown

Favorite Vacation place you have

been to more than once: Cruising

Favorite Vacation place: Sunday River

Most Recent Movie seen in theater: South Park Bigger Longer & Uncut

Pet: Golden Retriever named Newman

Sports Activity you do today: Aerobics

Favorite Sports Stadium: Sullivan Stadium I was part of a Half Time Show

Favorite Quote: "Botox Might Make Your Face Look Younger but it won't save your Ass."

Favorite Food: Chocolate

Number of States you have been in: 26



Joyce Mohr EA, Director

Last Book read: "Don't let's go to the

Dogs Tonight" by Alexandra Fuller

Favorite Vacation place more than once: Coast of Maine

Favorite Vacation Place: St John - Caribbean

Favorite Movie: Lion King

Most Recent movie seen in a theater: The Visitor



YOU CAN OFFER WHAT THE IRS CAN'T

Arvid Mostad, President Mostad & Christensen Inc.

With more and more people e-filing from their home computers, the local accounting firm needs to promote its strong suit. The new IRS figures show that two out of three personal 1040s were e-filed in 2009, and an increasing number of those are directly filed by the taxpayer.

What do you have to offer that the IRS can't? You can provide individualized tax, business, and financial planning for all taxpayers, even for those with relatively simple affairs. Who else does one turn to if they have questions about an upcoming financial transaction? Where do taxpayers get tax planning for the best college savings plan? Where do they get advice on buying business equipment or real estate? The list of potential areas in which you can assist them is very long.

You should capitalize on these strong points and use them in your marketing. Let people know that you do something besides prepare tax returns. Let them know you're an advisor for their tax, business, and financial affairs.

Your newsletters, brochures, and website should discuss what you offer and the kinds of problems you can assist with. Your clients and prospects should realize that their tax return is just a window into all of their other financial matters.

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Lorry Sorgman, EA, MST, USTCP

Ms. Sorgman, president of **Small Business Accounting Services**, is an Enrolled Agent, holds a Masters in Taxation from Suffolk University and is admitted to practice before the U.S. Tax Court.

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JANUARY 21, 2010

SPEAKER: CHARLES MARKHAM
TOPIC: REAL ESTATE TRANSACTIONS AND PROPERTY TAXES...

FEBRUARY 18, 2010

TOPIC: CANCELLATION OF INDEBTEDNESS INCOME AND CREDIT ISSUES
SPEAKER: TBA

MARCH 18, 2010

TOPIC: ANNUAL SHARE SHOP
:SPEAKERS: LORRY SORGMAN, EA, MST, USTC AND NANCY GOEDECKE, EA

APRIL 22, 2010

TOPIC: 1031 EXCHANGES
SPEAKER: MARK COUTURE

MAY 20, 2010

TOPIC: EHICS
SPEAKER: CAROL THOMPSON

MASEA 1040 TAX UPDATE SEMINAR, JAN. 9, 2010

**BEST WESTERN HOTEL, WALTHAM, INFO AT
[HTTP://WWW.MASEAONLINE.ORG](http://www.maseaonline.org)**

2010 Meeting & Annual Conference

Friday Night 7:00 pm Dinner with your colleagues (optional)

Saturday 7:00 am Check-in and breakfast

8:00 am Reasonable Compensation

10:00 am Payroll Tax Audits

12-1:30 pm Lunch and Annual Meeting

1:30 pm The Ugly 1040

3:30 pm How to Assist Our Aging Clients

5:30 pm Cocktails

6:00 pm Banquet Dinner

7:00 pm CPE: Let's Die and See What Happens: Executor/Executrix

8:00 pm Installation of Officers

9-11:00 pm Dancing to the music of the Anytime Band

LOCATION: Resort and Conference Center at Hyannis

35 Scudder Avenue (West End Circle), Hyannis, MA 02601

FEATURED SPEAKER: Beanna J. Whitlock, EA, CSA

Earn 8 CPE Credits

Member \$250 *Early discount by April 19th* \$220

Non Member \$275 *Early discount by April 19th* \$250

Guest and non-conferee – Saturday banquet dinner & entertainment \$50

Guest – Breakfast \$15 Optional Friday dinner at Brazilian

Grill (per person) \$33 Member Annual Meeting only NO charge

Lunch for non-conferees and guests \$23

MaSEA Meeting Schedule, 2009/2010

**PLEASE NOTE OUR NEW MEETING LOCATION:
BOSTON MARRIOTT NEWTON, 2345 COMMONWEALTH
AVE., NEWTON, MA.**

JUNCTION OF MASS PIKE, ROUTE 128 & ROUTE 30

Regular Monthly Meeting Price: Members, Spouse, Guest & Member Teleconference Fee: \$55 (\$50 if registered by the Monday before the meeting). Non-Member Fee \$60 (\$55 if registered by the Monday before the meeting) To Register, call 800-342-0031, Fax 978-535-1954, email: MSEAOFFICE@aol.com, Register on Line at <http://www.maseaonline.org>. Pay by Credit or Debit on line only using Paypal. Teleconferencers must pay prior to meeting and supply phone-in number & email address.

**3:30 Board Meeting; 5:00 Attitude Adjustment Hour; 5:45 New Member
Welcome and Tax Corner; 6:00 Dinner, 7-9:00 CPE Program**

MASSACHUSETTS SOCIETY OF ENROLLED AGENTS

OFFICERS & DIRECTORS, 2009/2010

PRESIDENT: Terry Durkin, EA

1ST VP: Eunice A. Malkasian, EA

2ND VP: Shantilal T. Patel, EA

TREASURER: Janet L. Foote, EA

SECRETARY: Stephen B. Jordan, EA

IMMEDIATE PP: Randy F. Hull, EA

BOARD OF DIRECTORS:

Joyce Ann Mohr, EA

Sarkis A. Babikian, EA

Ralph Macdonald, EA

Kay L. Cassidy, EA

Alice McElhinney, EA

The *Briefcase* is published by the Massachusetts Society of Enrolled Agents, P.O. Box 2263, Peabody, MA 01960-7263 for the benefit of MaSEA members and affiliates. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is distributed with the understanding that neither the publisher nor author is engaged in rendering specific legal, tax or accounting advice or other professional services. If specific advice or other expert assistance is required, the services of a competent professional person should be sought.

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Internet: <http://www.maseaonline.org>

Getting Ready for the New Privacy Law

By Irene Wachsler, CPA, MBA



Irene Wachsler

The new Massachusetts privacy law, due to take effect March 1, 2010, means that all nonprofits, in addition to all businesses, must take steps to protect personal information they collect. The good news is that doing so won't break the bank.

The new law—201 CMR 17.00 Standards for the Protection of Personal Information of Residents of the Commonwealth—is designed to protect each resident's personal information from potential identity theft. The following primer should help.

Personal Information

Your organization may have personal information if it received any donation, processed a credit card transaction, or if it has employees or consultants. Personal information consists of two pieces of data:

1. The individual's first name or first initial and their last name

One or more of the following information:

- a. Financial account #, credit card # or debit card #
- b. Driver's license or state-issued ID
- c. Social security number

Example 1. In response to the annual appeal, a nonprofit organization receives a personal check for \$50 from a donor. The organization photocopies the check for its records.

Both the check and the photocopy contain the donor's name, the donor's financial institution, and the donor's account number.

Example 2. Your organization is hosting its 10th anniversary gala event. An individual donor calls you on the phone and reserves two tickets for \$150. The donor gives you her credit card information for processing. You write this information on a piece of paper so that you can submit it for credit card processing.

The piece of paper that you wrote the information on contains personal information – the donor's first name or initial, her last name, and her credit card information.

Example 3. An organization (or its payroll service) issues Form W-2s to its employees and Form 1099-MISCs to its consultants.

Each W-2 contains the employee's name and social security number. The Form 1099-MISC may contain the consultant's social security number. Also, many organizations use their accounting package, (QuickBooks, PeachTree, etc.) to store the individual contractor's name, address and social security number.

The first two are examples of documents that contain personal information. In the last example, both documents (Form W-2 and Form 1099-MISC) and an electronic program (accounting package) store personal information.

What Do I Do with this Personal Information?

The new privacy law requires that you restrict access to any document—either paper or electronic—that contains personal information only to people who have a need to see the information. For example, you may decide that only the executive director and the financial officer should distribute paychecks and have access to the accounting folder stored on the computer network server.

Also, make sure that you really need all the information that you are collecting. For example, if you offer services to clients, you may want to consider assigning a unique number to them instead of using their social security or license number.

Lastly, when employees leave the organization, make sure you collect their keys and terminate their login ID so that they can no longer access any computer system.

(Continued on page 7)

(Continued from page 6)

Paper Document Handling

You must maintain all paper documents in a secure environment. One way to easily achieve this is to lock all paper documents in a filing cabinet or in a locked room with restricted access.

If you do not need the document any more, then shred it using a crosscut shredder. You cannot throw the paper away in the trash.

Also, if you have a cleaning crew that comes in, you must make sure that all of your papers are locked at the end of the day. If this presents a challenge, then ask your cleaning crew to come earlier in the day while you are still working.

Electronic Program/File Handling

There are a number of things that you must do to protect your computer systems. Most organizations are already doing this:

1. Each computer user must have their own unique login ID and password. The password must be at least seven characters long and contain one or more digits. You may want to consider requiring that each user change his password every 90 or 120 days.
2. Each computer system must have the latest version of firewalls, malware, and virus definitions. Microsoft Windows offers a firewall, as do most routers (NetGear, Cisco, etc.). You can also purchase a third-party firewall from Norton. Both McAfee and Norton offer very inexpensive anti-virus software that you can load onto your computer system.

You must encrypt all software and data files that contain personal information. It is much easier to encrypt the entire hard drive than it is to encrypt individual files. Microsoft Windows has an encryption tool. Another encryption program, TrueCrypt, is open-source software and is free.

You also need to encrypt any portable device that may have documents with personal information. This includes laptops, iPhones, BlackBerrys, PDAs, and flash drives. Other points to keep in mind:

Any emails containing personal information, including attachments, must be encrypted.

Before you send any faxes, including e-fax, that contains personal information, you must confirm that the authorized recipient has exclusive access to the fax machine/fax e-mail.

If you backup any electronic files that are not encrypted and contain personal information, then these backups should be locked in a secure location off-site. You may want to consider renting a safety deposit box at your local financial institution.

If you are getting rid of your computer or portable device, you must physically destroy the disk or device. Erasing electronic files doesn't cut it as it is easy to reconstruct the data. There are companies that specialize in this service.

Monitoring Your Computer Systems

The new privacy law requires that the organization monitor its computer systems on a periodic basis to make sure that there is no unauthorized access. Most firewalls and anti-virus programs offer logging which notes each time a user is denied access to the system. You should review these logs on a periodic basis. You may want to consider printing these logs and sign off that they have been reviewed.

Written Information Security Plan

The new privacy law requires that organizations have a Written Information Security Plan (WISP). A WISP is a documented plan that describes how the organization will maintain compliance with the new law. The WISP plan can be as simple as documenting one or more of the above policies. For example, an organization's WISP document might contain a policy that states "all paper documents containing personal information must be stored in the locked filing cabinet next to Joe's office."

Also, each organization must designate a security officer whose function is to train each employee on the above procedures. We recommend that, at a minimum, you review your WISP with each employee and have each individual employee sign-off that they have received training and understand your organization's WISP Policy. You may also want to consider offering this training on an annual basis.

Useful Tools

While I am not officially endorsing the following tools, you may find them helpful in complying with the new privacy law:

Locked filing cabinets

Wireless NetGear Modem: encrypted wireless access – \$30

(Continued on page 8)

(Continued from page 7)

Norton 360: firewalls, malware and virus definitions – \$60 for 3-user license

Carbonite: online, secured backup of computer data files – \$60 annually per computer

PGP: computer encryption – \$400 per license

Sandisk 8GB Ultra Backup USB Flash Drive – \$60

Box.Net: secured, online storage facility that allows sharing of files containing personal information (e.g. tax returns, copies of bank statements, mutual funds, etc.) – 15GB storage at \$49.95 per month

Irene Wachslar is managing partner with Tobolsky & Wachslar CPAs LLC, which specializes in audits, reviews, and compilations for nonprofit organizations. Contact her at irene@milliecpa.com or call 781-883-3174.



MEETING NOTES: BY BILL ROSS, EDITOR

Our guest speaker at the November meeting was Mary Hanson of the IRS. Mary is one of our favorite guest speakers. Mary spoke about the new electronic filing and explained how new changes with the Internal Revenue Service will effect us as professional tax filers.

Photo at left shows Mary at the podium at the Marriott in Newton.



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New Meeting Site

Meetings will be held at the Marriott Newton,

2345 Commonwealth Avenue, Newton, MA 02466



Located at the Junction of the Mass Pike,

Route 128, and Route 30. It is 4 miles south on Route 128 from our previous location.

Early Bird Discounts have been reinstated starting with the October meeting.

Meeting price is: \$55 members/guest/spouse (discount price \$50 if registered by the Monday prior to the meeting) \$60 non-members (discount \$55 for registration by Monday of the meeting). Program details remain the same. Special dietary requirements must be ordered in advance.

(Continued from page 2)

MOTION by Jordan to accept October 2009 fiscal YTD Financial statements, seconded by Babikian; accepted.

1040 Update Seminar provided by Ralph Macdonald:

Macdonald reported the annual tax law update conference will be held at the Best Western Ballroom in Waltham on January 09th, 2010. MacDonald reviewed the program venue and brochure. Program brochures will be mailed next week. MaSEA will email the brochure to members and produce a PDF copy of the Program materials that can be resold to interested members.

PR Committee Report provided by Janet Foote:

Foote commented on our "talk radio" project on "Money Matters with Chuck Nilosek", Boston's Business and Financial Radio Show. She recently met with the studio and is ironing out details (time slots and fees) for "interview" appearances on live-radio for interested members of MaSEA. Fred Brewitt, Chair of the PR Committee, plans to generate interest in the Money Matters Radio Show by sending information to the membership via email and in the Briefcase.

Education Committee provided by Shantilal Patel:

Patel reported 113 people paid and 110 people attended the recent NCPE conference held on November 10th and 11th. Patel thanked Harold Strong for his efforts coordinating the event. Patel is selling surplus books at \$50 each, including tax, to any interested member.

MaSEA Annual Meeting and Conference provided by Joyce Mohr:

Mohr gave the Annual Meeting at the Resort and Conference Inn at Hyannis" on Cape Cod a "green light" stating the conference to be "imminently doable". Beanna Whitlock is "locked in" as our speaker and 500 brochures announcing the event will be mailed according to timetables. E-mails will be sent announcing the conference. Financial arrangements have been finalized with the hotel. We need fifty registrants to break-even on the event. There will be no charge for attending the Annual Meeting at noon the day of the Conference. Installation of new officers will occur in the evening. McElhinney announced that there will be a monthly meeting business card drawing entitling each winner to a \$25 gift certificate should they decide to attend the Annual Conference.

Affiliate President Exchange (APEX) Meeting provided by Eunice Malkasian:

Malkasian reported that she and President Durkin recently attended the NAEA APEX meeting in Washington, DC on November 12th, 13th and 14th. Malkasian said she and Durkin came away from the meeting with some good opportunities to network and good ideas for our local chapter. She also stated IRS Commissioner Shulman's comments were helpful. For more information on this event read the NAEA e@lert November 20, 2009.

Old Business

SOP Committee provided by Ralph Macdonald:

Macdonald presented updated SOP's for:

SOS Committee

Teleconferencing Committee

Membership Committee

MOTION by Macdonald to accept and enter into permanent record the above SOP's, seconded by Babikian; accepted.

Macdonald reported the following sections of the SOP Manual remain to be voted and approved:

Apex Conference Committee – review done, ready for vote

MaSEA SEE Representative – review done, ready for vote

Scholarship Committee – Lucas to review and revise for approval

Macdonald stated once he receives Lucas' updates the pending sections will be voted on at our next meeting. Durkin remarked the Society SOP update has been a three-year project spearheaded by Macdonald and we are very grateful to him and those who contributed.

New Business

Babikian reported on the following IRS programs:

LITC (Low Income Tax Clinic)

VITA (Volunteer Income Tax Assistance)

TCE (AARP) Tax Counsel for Elderly

Babikian reviewed the three organizations in Massachusetts that currently offer some of these services:

Bentley College

Greater Boston Legal

Springfield Partnership for Community Action

and discussed matching grant requirements and opportunities available to our Society should we be interested in pursuing any of these community service volunteer programs. Mohr volunteered to inquire of Bentley further details on grant requirements and if our Society could in anyway serve as a referral base for any of Bentley's volunteer programs.

McElhinney will not be at the December board meeting as she will be recuperating from hip replacement surgery. Catherine White, will be covering for McElhinney as Membership Chair while McElhinney is recovering. We all wish "Alice" a speedy recovery.

There being no further business, the Thursday, November 19, 2009 Directors' meeting was officially adjourned by Terry Durkin, President, at 5:25pm.

Respectfully submitted by Secretary, Stephen B. Jordan