

THE PROFESSIONAL

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President's Message

Yvonne L. Dunkel, PA, ABA, ATA, Denver, CO, PASC President



I had the pleasure to attend a series of NSA sponsored meetings during December. The first one was the NSA Legislative Strategy Conference held on December 2nd. This was a hands-on conference designed to help me become a more effective state legislative advocate. That was quite a promise. The meeting had an agenda that included current happenings in Arizona, North Dakota, Wyoming and other states. The presentation included: information on the legislative process and testifying, lobbyists, State Legislatures and Boards of Accountancy. The importance of the NSA monitoring reports (State Board of Accountancy) was stressed. Without the monitoring of our State Board of Accountancy, we (PASC) could easily have our right to practice threatened again and again! It was an eye opening experience for me to hear about the problems that other states have had and how the right to practice as an accountant would be difficult if not impossible for me if I were to relocate. Not in this lifetime! Colorado has a relatively healthy atmosphere for an unlicensed Public Accountant to practice. PASC must stay alert. The State Society is always looking for help in monitoring the State Board of Accountancy meetings. Just one meeting, for a few hours, your participation would be of great value. Please call Gary Anderson to volunteer (719) 336-7785.

The National Tax Institute was held December 3rd and 4th. The speakers included Donald Cordano, Richard Minot and Steven Siegel. Topics included: The Economic Growth and Tax Relief Reconciliation Act of 2001, Income Tax Standards of Practice, Circular #230-Regulations Governing the Practice of Professionals (Attorneys, CPAs, Enrolled Agents, Actuaries and Appraisers), Expanded Pension & Education Benefits, Estate Planning under the 2001 Tax Law Changes, Tax Considerations of Separation & Divorce and Post-Death Planning & Elections. The two days were packed with information that I will be able to use during the current tax year. The time was well spent. The two-day seminar was worth every penny!

Now, for news on the home front. Congratulations go out to the Education Committee that organized the NCPE Tax Updates this fall. We had an outstanding attendance by accountants, tax-preparers, EAs and CPAs. I know that it couldn't be because there are so many changes in the tax laws. The reason is that the tax update seminars are getting better and better.

If you would like a break in the cost of your education, just join PASC and you will get seminars that are worth the money and at the member rate. Our newsletter has up-to-date information about our CPE programs to be offered throughout the 2002 year. Join PASC and you will get the information hot off the press. Or visit our website www.coloradoaccountant.org.

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PASC Board of Directors' Meeting

Date: January 17, 2002
Time: 1:00PM until adjournment
Place: Best Western
I-25 at 70
Denver, CO

If you need directions or more information, look it up at coloradoaccountant.org or call Jack Dirksen at (303) 457-4451

CANCELLED

NSA Scholarships

Students interested in applying for NSA scholarship consideration may obtain application material from a variety of sources including the financial aid office, accounting department or career center at their school. Application materials are also available on the NSA website at <<http://www.nsacct.org>> in the CONSUMER section or by contacting the NSA Scholarship Foundation office at 800-966-6679, extension 1312. The deadline for applications is March 10, 2002. After a three-level screening process, final recipients will be announced in July 2002. Contact Susan Noell at NSA at the above 800 number for further clarification.

The Professional Public Accountant

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We welcome any and all input or articles that you may wish to submit. Mail to 10651 Livingston Drive, Northglenn, CO 80234 or fax to 303-480-1690 or email to dscross@wyoming.com.

From the Governor's Notebook

Andrew T Moorehead, PA, CFP, ATP, Eaton, CO NSA Governor, District IX



I had other plans for this column until I had a long chat with Judy Yoder of Washington state this morning. Judy is probably known to all of you; she is the Washington State Director and one of the most competent and dedicated volunteers I have encountered anywhere.

In the course of a conversation on leadership and committees, she made a comment with which I am in total agreement. She said that for some reason the Western region has produced a large number of leaders for NSA in recent years. We discussed the effects of many of us coming from somewhere else and bringing pioneer values with us, or maybe it is the altitude, or the challenging and varied climate, or the water, or ????, but whatever it might be, we want to keep that stream of volunteers flowing.

Our 1st VP and incoming President in August, Harold Krieger, has challenged us to find folks who wish to further the NSA cause and volunteer for committee posts for the year starting August 2002. In talking with all of the District State Directors this week I am pleased that new names have come up, people who are making their way up the state society ladder who might also be willing to dedicate some time to both learning about and contributing to solving the challenges encountered at the national level.

In soliciting your help, I must also mention that NSA is working on but has not yet solved a puzzle: how do we get enthusiastic volunteers involved when funds are limited and not all committee members can be invited to committee week or otherwise become personally

involved in face-to-face committee work? In my opinion, technology is the answer. We need to support better communication methods. In this age of fax, phone and email (and Technology Chair Jarvis Windom of Wyoming would add, chat rooms and other techniques) there is no reason why we cannot structure virtual committees of interested and highly motivated people who may never see each other but communicate, cuss and discuss, resolve problems, develop programs, and otherwise work together for the common good.

Don't tell me that it won't work with the older, supposedly technology-impaired member. Those folks are catching up with the younger generation at a rapid rate. However, while this may be our solution for the committee of the future, you have to be careful to whom you speak. My wife of 40 years is not a technology fan, but has had to survive working from Colorado and Wyoming for many years as a "lone eagle" with a computer. When her employer converted her to Windows 98, I made the mistake of saying that she would not have any problems because the program was so "intuitive". Her response was that if it was so intuitive, why did she have to click on "start" to turn it off? So much for intuition!

I have digressed. My point is to invite those of you who would like to work with NSA this coming year to let your State Director know. He or she will let me know, and I will make sure your name is on a list. Whether you get selected or not, you will be among those who will be considered for future appointments and the rewards that come with service to your profession. Join me and many others from the district who have had much satisfaction from our involvement with NSA.

**PASC
Annual Convention
& Accounting Forum
June 9-12, 2002
Snowmass, Colorado**

**NSA
Annual Convention
August 21-27, 2002
Honolulu, HI**

NSA STATE DIRECTOR'S REPORT

William Eskew, PA, EA, ABA, Colorado Springs, CO



Another Year is here and along with it comes new opportunity, new horizons, new mountains to climb, and best of all, another Tax Season. I certainly hope you had a great Holiday Season. It was fun to spend time with the family especially

our grand children; it is also refreshing to see and hear their perspectives. However, we now have a new phenomenon in our household: "teenagers". My son Bruce's twins are now 13. Boy are we going to have fun this year.

In December I attended the NSA NTI Seminar in Las Vegas and the District IX & X State Directors and ASO Presidents meeting. Attending were: Steve Desdier, NSA President, Harold Krieger, NSA 1st Vice President, Wanda Samek, NSA Governor District VIII, Andy Morehead, NSA Governor District IX, and Lynn Holomon, NSA Governor District X. Yvonne Dunkel and I represented PASC. Every state had representation except Wyoming. Andy Morehead, District IX Governor, covered very nicely for them.

Barbara Stechnij, President of ACAT, informed us that ACAT has received a large number of applications for the waiver from testing for the (tax) credentials ATA & ATP. They are currently processing these applications.

We were also informed that the next date to sit for the ACAT (accountancy) exam is June 7, 2002. There are new tools available as study aids for the ACAT test in accountancy. If you have not

taken this examination, I strongly urge you to consider doing so, as it will become more important for you to have qualified credentials as we move forward in this decade.

Harold Krieger, NSA 1st Vice President, asked for a list of volunteers for NSA committees. I have submitted a list of names from PASC to serve on the NSA committees. If you want to serve on a National Committee and I have not talked to you about submitting your name, please let me know about your interest.

Other subjects covered were Legislation and the 3rd Edition of the Revised Uniform Accountancy Act. Colorado has been very fortunate as far as our right to practice, and our recent dealings with our State Board of Accountancy. Please be sure to give a hearty THANKS to all of those who have been involved in bringing this about and helping us maintain our rights. The Coalition for Affordable Accounting grew out of our NSA Task Force, but is now a separate organization whose purpose is to protect the rights of unlicensed accountants to practice. The Coalition is available to State ASOs when needed.

It is amazing how much can be accomplished when a group like this comes together with the good of the Society in mind. I feel very fortunate to serve as your State Director and am pleased to be able to be involved in the workings of the National Society of Accountants.

If you have any questions or I can be of help to you please contact me at weskew@pcisys.net (e-mail) (719) 471-7266 (tele) (719) 471-7686 (fax).



Teachers ... Anyone?

Matthew C. Lewis, PA, EA, PASC President-Elect, Delta, CO

The holidays are over and another tax season has rapidly arrived. As I look back over this last year, it is hard to believe all that has happened...the loss of friends and associates such as Rich Hamrick and Bob Tucker during this past summer. Then the tragedies of September 11th. But also there have been numerous bright spots, full of opportunities and challenges. Being asked to be the President-Elect of PASC, attending our annual convention in Frisco, and the national convention of NSA in Minneapolis as a "First-timer", teaching a two hour seminar for the Western Slope chapter, new clients and new employees. WOW...what a year!

As an officer and board member of our society, my perspective has changed somewhat from a focus on only the Western Slope chapter, to how can we improve the quality of the benefits we receive as members. One of the greatest benefits of the society to me personally is the education received through our seminars and also through the association with other professionals with areas of expertise in practice different from my own.

One experience late last summer has brought to mind an opportunity that I would encourage each member to consider. I was asked by several members of our chapter to present a two-hour seminar on "An S-Corporation's initial tax return and elections". Teaching a class of peers was a new experience for me. As a result of my study and preparation, I'm sure that I learned more than any of the attendees. Although I prepare a large number of S-Corporation returns each year, I was reminded of some of the details that are easily overlooked. I know that I will do a better job for my clients as a result.

Providing quality continuing education is one of the primary functions and purposes of PASC. After preparing to teach the class over here in Grand Junction, I realized that teaching the same topic for other chapters would not be a major burden. Each of us has naturally developed areas of expertise in a particular area of

interest. We have a great wealth of knowledge and experience right here in our own society. Sharing that knowledge with our fellow associates will benefit all of us. Bringing in speakers is good, but I believe that we are overlooking valuable resources that are much closer to home. Many of our members have experience teaching seminars, and some have the ability to do so even though they have not yet been given the opportunity. I challenge and encourage you to step forward and let us all benefit from your knowledge, experience and expertise.

IRS Practitioner Hotline Important New Number

A new Practitioner Priority Service (formally called the Tax Practitioner Hotline) will be phased in on two dates in our area. Tax Practitioners in Arizona, Nevada, New Mexico and Utah may start using the free number for accounts related services now (Jan 2, 2002).

Colorado, Montana and Wyoming may start using the number on **February 18, 2002**. The new number is **866-860-4259** and the hours of service will be from **7:30 a.m. until 5:30 p.m.** local time, weekdays. Until February 18, the Colorado line will still be operational (**303-820-3940**).

The Practitioner Priority Service provides a number of benefits to practitioners. The service will be a free telephone call and will improve the overall consistency and quality of service. It will also improve accessibility into the system and reduce wait times. All employees answering these calls will receive specialized training to handle practitioner issues.

MEET A MEMBER

Larry French, PA - Fort Morgan, Colorado



I have been in the Accounting and Bookkeeping business since 1952. My father was the manager of the Co-op Grain Elevator. At harvest time when he was behind posting scale tickets, I would pick up the process of Gross – Tare = Net. I

didn't realize at the time that there was an equation and it had a name like Debits and Credits.

I graduated from New Mexico State University in 1972. My first job out of college was as the Controller of an agricultural company. It was a farm ranch feedlot and cattle background operation. It had crops, cattle, and ranching in 10 states (Louisiana, Georgia, Tennessee, Texas, Kansas, Colorado, Wyoming, Washington, Idaho and Nevada). A Beechcraft Duke airplane was our ATV (all-terrain vehicle). This job was an education in itself. I didn't feel that it was what I wanted to do. Sour cattle markets, rotten crop prices, and a family feud (owners) didn't help. Then this classified ad says, "Accountant - CPA candidate wanted". It sounded just like what I wanted. This was another education, two owners, three staff and myself, as a junior flunky.

Three years, and I still hadn't found my niche. An accountant friend mentioned that there was an accounting practice for sale up Highway 76, toward Denver. I discovered a somewhat run-down practice, with taxes, bookkeeping and plenty of work. So on December 1, 1977, I bought a desk, found office space, office equipment and got busy. My mentor was a long time hunter and sportsman. I like to hunt pheasants, ducks, and geese and fish the reservoirs in Nebraska. It's enlightening how much one can tell about ones business attitude, as one conducts his business with fairness and honesty. My mentor never took one more fish than the limit, never shot one more duck or pheasant more than his limit. He was an honest accountant and taxman. I set my standards of public practice according to Paul (my mentor). Every client respected him,

appreciated his honest business wisdom and I worked hard to fill his shoes. I believe I have established the same tough standards.

A couple of years into this practice another Accountant (Ardith Cody from Roggen, Colorado) asked me to be her guest at a meeting of the Public Accountants Society of Colorado. I attended meetings with her, became a member, and tried to contribute my limited experience to our Society. However, I missed a meeting and was nominated and elected to the Board of Directors of PASC. I had become acquainted with another accountant in Fort Morgan when I worked for the CPA firm. When she died, her estate asked for bids on her practice. My fellow colleagues down at 111 E. Railroad Ave. approached me to join them so that together we could purchase the accounts left in her estate. Thus Mullen, Tucker and French, Public Accountants was formed. Mr. Mullen went to California leaving Tucker and French, Public Accountants. Mr. Tucker passed away in the summer of 2001 and now it is back to Larry L. French, Public Accountant.

I am a witness to the long-standing battle with The Colorado State Board of Accountancy to protect the practice rights of unlicensed accountants. The history goes back many years before I joined PASC. I have seen PASC spend thousands of dollars to assure us the right to practice. I must give special thanks to Everett Hanson, Al Freedman, Richard Hamrick, Louis Martinez, Ed Touber, Mildred Elkins, Bill Eskew, Ardith Cody, Jack Dlrksen, Larry Carroll, Jack Kopp and the many experienced members and officers of PASC for defending our "rights". They are all a credit to our Accounting Profession (or is it a Debit – an asset).

My hobbies include a 28' RV, a 1987 Bronco II, Dingy, a 16' boat, plus all the fishing, hunting, boating and camping stuff someone with two sons and four grandsons can accumulate over a life time to date. Retirement is a few years off. Keep a tight line, and may your books always balance.

The Green Season

Carlos G. Klinger, PA, Aurora CO

Be it my first words, I wish to all my colleagues that the arrival of the New Year will bring them happiness and prosperity in grand company with their deepest desires. Along with so many others after the Christmas vacations, I am getting ready for the “sweet battles” of every year, Income Tax Season. As in all wars, we have to be prepared for the impatient. For that reason I want to have more patience, for I will surely have to explain relentlessly to my “enemy” clients, the changes that will be in their return for this year thanks to the “Strategists of Congress”.

I believe I will be able to make it without a lot of effort, thanks to all the seminars and classes that I have attended with NCPE and the Mile High Chapter of PASC. They have treated me well as they have helped me to revisit and to understand the new legislative changes attending our annual “battle”.

As a good soldier, I have prepared all my defensive

weapons. My calculator has tape and a new roll of paper. We are finished installing the 2001 tax software on my new network. I purchased a lot more storage capacity, thinking (dreaming, should be the correct word) that we will have numerous new clients. I only hope that they are not “tax mentalists”, because if they are I will send them off to the “experts”, known to me as “Express Agents”, due to their tax preparation at the speed of light. Where they can be found abundantly is at those most famous national franchise offices. There one can find “the best advisor”, little does it matter that after the tax season, we will have another season to fill out IO4OXs to correct the errors made by these “professionals” of tax preparation.

I believe, with deep sincerity that we all are under perfect conditions to face the “hard and exhausting battle” that lies ahead. And as in past years, we will leave winners and we will be able to enjoy well-deserved “vacations”. We will continue participating in seminars and classes that allow us to better prepare for our annual “battle”. To conclude, I wish all my colleagues the best, in the tax season and as we pass from the red debit to the green credit, enjoy the GREEN SEASON!

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Welcome to All Our New Members - 2001

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Colorado Springs, Colorado
Active

Michael R. Card, PA, EA
Denver, Colorado
Active

Paul E. Cool, PA
Colorado Springs, Colorado
Active

Arleen Drumm, PA
Aurora, Colorado
Active

Terry Halley, CPA
Cheyenne, Wyoming
Nonresident

Sherry A. Heater, PA
Commerce City, Colorado
Student

Kenneth F Howard, PA
Fort Collins, Colorado
Active

Garland Lumbard, PA
Fort Collins, Colorado
Active

Charles Pennell, PA
Loveland, Colorado
Active

Jim Primm, P C, CPA
Prairie Grove, Arkansas
NonResident

Donna Schuerg-Surratt, PA
Westminster, Colorado
Active

James R Tobin, Jr., PA
Denver, Colorado
Active

Barry L Zaiger, CPA
Loveland, Colorado
Active

Myron Berg, PA
Fort Morgan, Colorado
Active

Darlene J. Buss, PA, EA
Westminster, Colorado
Active

M. Evelyn Carson, PA
Wheat Ridge, Colorado
Active

Jeanine B. Croy, PA
Arvada, Colorado
Active

W. Jean Foran, PA
Calhan, Colorado
Active

Teri K Handler, PA CTP
Aurora, Colorado
Active

Michel M. Heneen, CPA
Denver, Colorado
Active

Norma D Hughes, PA
Casper, Wyoming
Non resident

Connie L. Martinez, PA
Littleton, Colorado
Active

Priscilla J. Porter, CPA
Boulder, Colorado
Active

Melody A Puckett, PA
Casper, Wyoming
Non Resident

Lawrence M. Skolds, PA, EA, ABA
Fort Collins, Colorado
Active

Donna M. Ward, PA
Flagler, Colorado
Active

Paul M. McCoy, PA
Westminster, CO
Active

Kathy Braschler, PA
Littleton, Colorado
Active

Corrin Campbell, PA
Boulder, Colorado
Active

Gene Cave, PA
Montrose, Colorado
Active

Richard O. Deem, CPA
Westminster, Colorado
Active

Marsha M. Franklin, PA
Denver, Colorado
Active

Dan Harbour, PA
Lake George, Colorado
Active

Robert J. Holthus, PA
Grand Junction, Colorado
Active

Fred J. Koch, PA
Rifle, Colorado
Inactive

Jan McDaniel, PA
Casper, Wyoming
Non Resident

Keith G. Price, CPA
Cheyenne, Wyoming
Non-Resident

Brenda S Ross, PA, E.A.
Goodland, Kansas
Non Resident

Mary Southworth, CPA
Littleton, Colorado
Active

Vanhan E. Weston, PA
Colorado Springs, Colorado
Active

Linda Abrahamsen, PA, MBA
Morrison, CO
Active

ColoradoAccountant.org

Joanne L. Konrade, PA, EA, PASC WebMaster, Broomfield, CO

First of all, I want to say thank you.

Thank you, Cheryl Dirksen, for all your work on the member data base. My goal for the member data base is to increase business for all PASC members. Having accurate information is essential so potential clients can reach us. Cheryl, I really appreciate all the time you've spent on the project.

And thank you to all the PASC members who were gracious enough to allow me to take their pictures at the tax seminar in Northglenn in November. I will admit, these are not "studio portrait" quality, but they personalize the member data base and make us seem more real to clients seeking our services. The offer to replace your photo with something you would like to submit is always available.

A very important and heart-felt thank you to Deanna and Bob Cross for giving so much of their time, effort and creativity to make this newsletter possible. I must admit, I was a real cry-baby about the last issue. Deanna and Bob were wonderful. They consoled me and then made some big changes which resulted in an even greater contribution by them. You are both amazing and PASC is so fortunate to have you. Thank you.

I just received a very helpful tip from mom via email. She's rightly annoyed by Qwest's announcement of their intent to share customer information with other vendors. The consumer must be proactive to opt out of the disclosures. Here is the URL to use to quickly make that election:

<http://www.qwest.com/cpni/>

You may have noticed that our ColoradoAccountant.org "Links" page has been totally redesigned. It is very compact and has many more links to sites of interest. Take a look and please email me with any of your favorites which are not listed.

In the last article, I said I would report back to you about the use of the Social Security web site and its use for applying for retirement benefits. The results are that it is a gem. It steps you through every question, every issue and finally prints a letter based upon your

responses. It also prints instructions about what to include with the letter and where to send it. My husband followed all the instructions and has been notified of his upcoming retirement benefits and when they will begin. He was very pleased.

Okay, business taken care of; let's do a step-by-step and see if we can all find our personal data base record. Are you ready?

1. In your browser "location" window, type the following:

<http://www.coloradoaccountant.org>

2. When the page fully loads onto your screen, click your "Bookmarks" or "Favorites" word or icon and save this site.

3. Now, click the "Site Navigation" bar on the PASC page.

4. Then click "Find A Member" on the drop-down list.

5. Be patient, this page takes a little time to load. If your sound is on, you will hear a poignant tune by the Beatles called "We Can Work it Out". (my favorite lyrics say, "Try to see it my way . . .")

6. You are almost done. Click the box to the right of the "Last Name" which shows as "Ableman". This will clear all fields. You type in your last name.

7. Scroll down and click the "Search" button. Your name and perhaps a few others will appear in the bottom box.

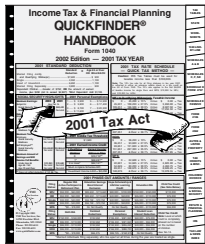
8. Click your name and your record will appear. If your photo is attached, be patient; it will take a few moments to load.

The last thing to do before leaving your record is to check your information. If there are any changes to report, click the "Report A Change" link at the top of the page to send me an email.

Okay, now for the hard stuff. Back to Tax Season.

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 - Sch C & F Form 4797
 - Sch D Form 4562
 - Sch E
 - Sch SE

- Other tabs include: Autos & Listed Property, At Risk, Tax Credits, Children, Pensions, Social Security, Estate & Financial Planning, and Government & Economy.

- Special Section Covering 2001 Tax Act (Tax Law Tab)**



Personal Income Tax Organizer and Deduction Finder with purchase of the Form 1040 Quickfinder® Handbook.

See order card for pricing. Release date mid-December 2001

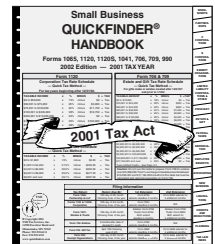
Book #2 – Small Business Quickfinder® Handbook

- Use to prepare returns for:
 - Partnerships
 - C-Corporations
 - S-Corporations
 - Fiduciaries
 - Gift & Estates
 - Payroll
 - LLCs
 - LLPs
 - Exempt Organizations

- Other tabs include: Depreciation, Accounting Principles, Starting a New Business, Acquisitions & Dispositions, Tax Credits, and Tax Planning

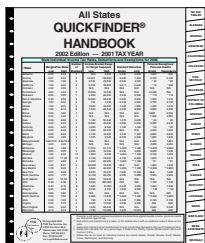
- Special Section on 2001 Tax Act (Tax Law Tab)**

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Topic - Mortgage Financing for the self-employed/small business

(see advertisement on page 2)

10:00 AM to 1:00 PM - Lunch Included

January 17, 2002

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March 21, 2002

Tax Round Table Discussion Denver, CO

May 7, 2002

Gear-Up Video - Estates and Trusts Colorado Sprgs, CO

May 23, 2002

Elder Care Seminar / CSA Denver, CO

June 9-12, 2002

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September 21-22 -

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October 2002 -

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November 2002 -

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December 2002 -

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