

THE PROFESSIONAL

PUBLIC ACCOUNTANT



Published by and for the Members of the Public Accountants Society of Colorado

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President's Message

The Board meeting on August 1st, 2008 was an exciting and busy day. Along with the Board Meeting, Matt Lewis introduced the Leadership Training for the Board and any member who wishes to sharpen their personal skills. A reading list for the training was given via E-mail to those members continuing in the training program. There is also a 2 day Leadership program presented by NSA in October, 2008. This is geared more on leadership of an organization whereas our leadership training will be tailored to PASC members and what they need to learn to be effective in their office. Those PASC members interested in starting the training should contact the PASC executive office for the meeting dates. The meeting starts at 10:00 am and goes to 4:00 pm. on selected Fridays. Lunch is provided to the participants. The training is a part of the meeting. Attendance by the membership is important because of the current Legislative bill that affects Tax Practitioners in the state of Colorado.

Our Legislative Committee Chairman is Lee Jensen and she really, really needs help with monitoring the Legislative sessions. We inadvertently missed a meeting where Legislation was passed without our knowledge. The effect is not detrimental at this time, but it may disallow the use of PA and the ability to audit accounts.

The Board of Directors is still working on the By-Laws and will



photo by Lynette DL Myers

CALENDAR OF EVENTS

Sept. 17 & 18: Corporation, Partnerships & LLC's Workshop - Denver

Sept 18-19: Corporation, Partnerships & LLC's Workshop - Colorado Springs

Nov 5-6: Individual Income Tax Update - Grand Junction

Nov 10-11: Individual Income Tax Update - Durango

Nov 11-12: Individual Income Tax Update - North Denver

Dec 2-3: Individual Income Tax Update - Southeast Denver

Dec 3-4: Individual Income Tax Update - Colorado Springs

More details on page 9

work with the membership as a whole to finalize the changes. This may be as a membership E-mail rather than a membership meeting since the membership meeting takes place once a year at the Annual State Convention.

The Annual Convention the coming year, 2009, will be held in Gunnison, Colorado. The Western State College Events

Center has been scheduled for our Convention. Other details such as hotels, meals, and seminars will be developed by the end of the year. All

Continued on page 2

From the President, *Continued from page 1*

newsletters. Please start planning to be in Gunnison, Colorado on June 24, 25, and 26, 2009. The schedule is for the end of the week so that the Convention participants can take their families and possibly spend Saturday on a mini vacation in a beautiful area.

National Society of Accountants had their annual convention in Kansas City, Missouri on August 27-29. Our very own Andy Morehead completed his two year term as President of NSA and our own Robert L. Cross is now First Vice President, and he helps with legislation at the national level.

All NSA Members are welcome to attend the national convention. There is a sum of money set aside by PASC to partially reimburse delegates to the convention. Delegates also supported Judy Shoemaker, who was nominated and elected as our state director, representing PASC at the national level of the organization.

Lastly, please inform yourself on issues that affect your right to

practice by attending a Board meeting and availing yourself for professional training which is limited to 2 hours each session.

Sincerely,

John Martinez, President

■ PASC ■

Serving Aging America

By Connie Martinez - connie_martinez01@comcast.net

Ladies and Gentlemen and people of all ages: On June 23 and 24, 2008, I attended Level I of the Serving Aging America Seminar series offered by PASC.

I feel that I attended one of the most important Seminars I have ever attended. I wished I had the information when my mother became chronically ill on April 8, 2008. I always felt that my mother and I had made good plans for her care. We could not have been more wrong. We were only 1/4th right in what we planned. I thought I had a good grip on Kaiser Medicare HMO and what the plan covered. Not so.

In this seminar we covered Medicare, the new Health savings Accounts, Medicaid, Medigap, Social Security, Long Term Care, and Veteran's Benefits.

It is so important to have this knowledge not only for our clients,

but, for ourselves. It is not something to be put aside for later, but for action now. I highly recommend this seminar to all our associates to add to their practice.

Serving Aging America Levels I, II, and III will be offered in the Denver Area in 2009. Look for more information in the next issue of the newsletter. ■ PASC ■

Meet Our President Elect - Ernest Kozacek

Ernest Kozacek, our new Vice President

I am a Colorado native, married with two grown kids and four grandchildren.

I am a graduate from Western State College with a degree in Accounting.

My work experience is varied and consists primarily of two years staff accountant at National Farmers Union Insurance, eight years an auditor for the Colorado Department of Labor and one year with the Hospital Commission.

From August 1981 til present I have been on my own in Lakewood doing payroll services, monthly accounting and all types of taxes.

You can reach me at 303-238-7930, or email ekozacek@aol.com ■ PASC ■



photo by Lynette DL Myers

A D V E R T I S E M E N T

Looking for Volunteers!

PASC has done a group order of QuickFinder handbooks and Taxbooks in past years. We need volunteers to offer this quantity discount to our members. The volunteer would collect orders from Members, place the order with either QuickFinder or TaxBook, and then distribute the books once they arrive.

If you are interested, please contact the PASC office at 303-452-8227 (800-578-4451) or email Ruth at ruth@coloradoaccountant.org.

A D V E R T I S E M E N T

Office Space for Lease

JUMBO OFFICE with cozy nook for lease in super Victorian, within walking distance of downtown and St. Joseph-Presbyterian Hospital district. Huge window, French door, funky ceiling add up to way more than boring, inside cookie-cutter space. Big enough for 3. **FREE MONTH** with year lease.

Come by 1828 Clarkson
call 303-830-2300;
or email bbernstein@qwestoffice.net



**Public Accountants Society of Colorado Presents:
NCPE Individual Income Tax Update Seminar - 1040**

Please mail registration to: **PASC**
P.O. Box 1078
Eastlake, CO 80614-1078

PHONE: 303-452-8227
800-578-4451
FAX: 303-457-0770

Website: www.coloradoaccountant.org

Please enroll me/us for the: **Individual Income Tax Update Workshop**

- _____ Nov. 5 & 6, 2008 – **DoubleTree Hotel Grand Junction**, 743 Horizon Dr (Exit 31 off I-70) **Grand Junction**
(970-241-8888) Hotel Room Rate - \$89 per night
- _____ Nov. 10 & 11, 2008 – **DoubleTree Hotel Durango**, 501 Camino Del Rio (HWY 550 & HWY 160) **Durango**
(303-696-6644) Hotel Room Rate - \$104 for one king bed, \$124 for 2 queen beds
- _____ Nov. 11 & 12, 2008 – **Ramada Plaza (former Holiday Inn)**, 10 E. 120th Ave. (120th Ave. & I-25) **Northglenn**
(303-452-4100) Hotel Room Rate - \$77 per night
- _____ Dec. 2 & 3, 2008 – **Embassy Suites**, 7525 E Hampden Avenue (1 Mile E. of I-25 on Hampden) **SE Denver**
(303-696-6644) Hotel Room Rate - \$119 per night
- _____ Dec. 3 & 4, 2008 – **Clarion Hotel**, 314 W. Bijou (Bijou & I-25) **Colorado Springs**
(719-471-8680) Hotel Room Rate - \$79 per night

Name(s): _____

Address to send Confirmation: _____

City _____ State _____ Zip _____

Phone (_____) _____ Fax (_____) _____

Email _____

Email Confirmation of my registration is fine _____ I prefer a mailed postcard for confirmation _____

Register at least 2 weeks before the seminar and save \$25 with our Early Bird Discount!

Registration fee includes continental breakfast, lunch, refreshments and all workshop materials.

Are you a member of PASC or NSA? _____ If yes, please provide your Member Number _____

Member pricing will apply to ALL non-members registering from a PASC/NSA member's firm

Member Early Bird Rate \$290 _____ Member Price \$315 _____

Non-Member Early Bird Rate \$320 _____ Non-Member Price \$345 _____

GROUP DISCOUNT for ALL Groups of 3 or more from the same firm – subtract \$10 per attendee.

\$ _____ x _____ = Total Amount \$ _____ - \$ _____ (Group Discount, for 3 or more) = \$ _____
price number attending Subtract \$10 per attendee if applicable Grand Total

Check Number enclosed (payable to PASC) _____ Charge: _____ VISA _____ MasterCard _____ Discover

Card No. _____ / _____ / _____ / _____ / Expiration Date _____

Card Code (three digit number above signature on the back of the card) _____

Name on Card _____ Authorized Signature _____

***** Please let us know if you have any food issues which require special meals. We will do our best to make accommodations, but we need to know in advance to give the hotel preparation time. Please inform us at the time of registration. *****

Who is Protecting Your Right To Practice?

By Jack D. Dirksen, Executive Director of PASC - jack@coloradoaccountant.org

If you woke up some morning and learned that the Colorado Legislature had passed a law that indicated you could no longer call yourself an accountant and there were other restrictions on your practice, how would this affect your business? In some states, the law is so restrictive that you cannot call yourself a public accountant or an accountant or indicate in any way that you provide an accounting service unless you are licensed by that state. The accountancy law in every state contains a list of "Prohibited Acts" Here is an example of the "Prohibited Acts" from the Accountancy Law in one state:

"PROHIBITED ACTS: Any person shall be guilty of a class A misdemeanor who shall use, in connection with the practice of public accountancy, or in any manner tending to imply that he is an independent accountant or auditor, the designations "chartered accountant", "certified accountant", "expert accountant", "certified tax accountant", "tax accountant", "enrolled accountant", "enrolled public accountant", "registered accountant", "licensed accountant", "incorporated accountant", "registered public accountant", "licensed public accountant", or any abbreviation thereof, or the letters "C.A.", "E.A.", "C.T.A.", "T.A.", "E.P.A.", "R.A.", "L.A.", "I.A.", "P.A.", "R.P.A.", or, "L.P.A.", except as provided elsewhere in this article, or any other designation tending to imply that he has expert knowledge in accounting or auditing." *(This paragraph is referring to unlicensed accountants.)*

Thanks to the efforts of many PASC Members who have volunteered over the years, we do not have these restrictions in Colorado. These

volunteers have been successful in three major court cases, and they have worked with the legislature for many years to maintain your right to practice. If we cease being vigilant, we could be subject to serious restrictions in new legislation.

Without volunteers, the Public Accountants Society of Colorado (PASC) will cease to exist and no one will be "going to bat" for you down at the capital. This year is particularly important because the initial steps of the Sunset Review of the Colorado State Board of Accountancy have already been taken. The Sunset Review process opens the door to new legislation and changes to existing law will be made. The Sunset Review Committee of the State Board has been organized and PASC has been invited to sit in on this process. In fact, we have already spoken in support of the 150 hour requirement as it is currently being discussed. We believe the requirement for mandatory peer review for license renewal would be an onerous burden for the small CPA firm, and we will speak out against it. The initial discussion for this item is scheduled for the September meeting.

PASC is a volunteer organization and our volunteers come from sole proprietorships, small partnership practices and other small accounting and tax practices. The people who currently volunteer and have volunteered over the years were as busy as or perhaps even busier than many of you are today. Yet they took time from their practices; rearranged scheduled appointments, and put in extra time at night and on weekends to accomplish these important goals. Many of our current volunteers have been volunteering for many years and need to be replaced, or at the very minimum they need a break.

The officers, directors, and the various committees are made up of

volunteers who are responsible for the business operations of the society. Many of these responsibilities are assigned to the paid staff in the office. The office is responsible for billing and collecting dues; registering and collecting fees for our seminars. We work closely with the Education Committee to schedule seminars; and we work with the hotels to arrange for all of their services in connection with our seminars. The office staff also works with other committees and provides a variety of other services that are too numerous to list here, **but the volunteers make the decisions on how the Society functions.**

We have an ongoing need for volunteers to run this Society. Try as we might, we do not have the time to contact each one of you personally, so please step forward and offer your time and talents. Many of you volunteer for outside activities and hobbies that don't leave much time for your profession. These activities are important, but are they more important than your profession? I suggest you need to find a way to support this Society and your profession with some of your time and talent.

Please contact the chair of any committee; any of our officers; any of our directors; or Ruth and Jack in the office **to volunteer your time and talents and let us know when you are available.** ■ PASC ■

Congratulations & Society Announcements

On August 1, 2008, the PASC Board approved a draft of potential changes to the PASC Bylaws. These changes must be voted on by PASC Active and Life Members. In accordance with our Bylaws, Article IX Section 2, a special meeting of the membership is called for **Friday, September 26, 2008 at 10:00 a.m.** This brief Membership Meeting will be held at

Continued on page 6



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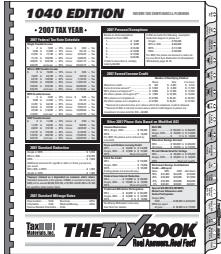
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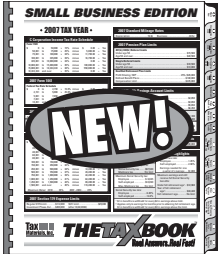
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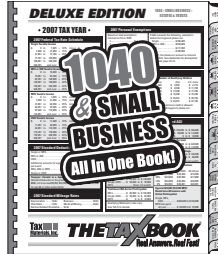
1040 EDITION

Income Tax Compliance & Planning
Release Date: 12/15/07



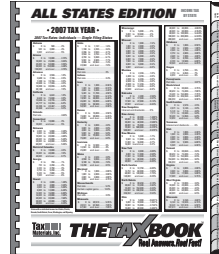
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| 2007 BOOKS Pricing by Edition Per Copy | 1040 Edition | \$42 | \$39 | \$41 | \$38 | \$40 | \$37 | \$38 | \$35 | \$37 | \$34 | \$ | A | \$ |
| | Small Business Edition | \$42 | \$39 | \$41 | \$38 | \$40 | \$37 | \$38 | \$35 | \$37 | \$34 | \$ | B | \$ |
| | Deluxe Edition | \$87 | \$63 | \$84 | \$60 | \$82 | \$58 | \$81 | \$57 | \$59 | \$55 | \$ | C | \$ |
| | All States Edition | \$74 | \$69 | \$71 | \$66 | \$70 | \$65 | \$87 | \$62 | \$85 | \$60 | \$ | D | \$ |
| 2007 WebCD (S&H included) | WebCD QUANTITY | 1 | 2 | 3-10 | 11-20 | 21+ | Qty. | Price | Cost | | | | | |
| | WebCD price per copy | \$85 | \$83 | \$75 | \$73 | \$85 | \$63 | \$55 | \$53 | \$45 | \$43 | \$ | \$ | |

Don't forget about CPE courses, client pocket calendars, and FastTaxFacts!

| | | | | |
|---|-----------------------------------|---------|---------|----|
| 2007 CPE COURSES (S&H included) | 1040 Edition CPE 8 hrs. | \$35 | \$33 | \$ |
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| | Ethics Edition CPE 2 hrs. | \$25 | \$28 | \$ |
| CALENDARS | 1 Pkg. of 30 Client Pocket Cal. | \$45 | \$42 | \$ |
| FastTaxFacts | Tri-fold laminated sheet | \$15.95 | \$14.95 | \$ |

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Tax Materials, Inc.™

Proactive IT Maintenance Lets You Declare Independence From Day-to-Day Computer Problems

By Debi Bush - DBush@cmitdenver.com

If you run a small business, you might deal with computer issues in one of these ways:

1. "Hey Margaret!" One employee (and it might be you!) is designated the office computer guru, and he or she is the person everyone asks to fix a printer problem, help out with a software install, or set up a new workstation.
2. "I got a guy." There's nobody in the office to deal with computer issues, so you have somebody on speed dial – an independent contractor with a lot of clients just like you.
3. The Yellow Pages. If there's a crisis and you can't get your "I got a guy" on the phone, you pick up the phone and get whoever's available.

All of these approaches have their drawbacks: they waste valuable employee hours; they're reactive instead of proactive; and they can end up being a lot more expensive compared to the cost of preventing problems from happening in the first place.

Proactive regular maintenance (often referred to as "Managed services") allows you to off-load the responsibility for periodic software updates, antivirus updates, security patches, and other regular maintenance so that you can concentrate on running your business. You can have round the-clock professional support and know that your systems are being monitored and you'll be alerted if they see a potential problem developing (for example, a failing hard drive). And because most managed service providers bill by the month, you'll be able to budget for computer support instead of getting whacked with big repair fees whenever a problem arises.

Different managed services providers offer a different slate of options; some charge for services that others include automatically. Our managed services package, CMIT Marathon, has automated proactive maintenance daily with virus updates spyware detection and removal plus management of security patch updates. Remote technicians and engineers at a Network Operations Center, a US-based help desk, and on-site support help ensure you're not alone when you encounter computer issues.

Whatever IT services firm you use, it is important to view the proactive and preventative maintenance of your technology network and environment as an investment in your business. Some people call it "computer wellness insurance". Which makes more sense: investing in your technology on a regular monthly basis to keep it running smoothly or to spend thousands of dollars after your server is down for two days and you still can't get any work done. ■ PASC ■

Information Wanted About YOU!!!

We would like to start a celebrations corner in the newsletter where we can update each other about special events in each of your lives. They can include but are not limited to:

- Birth Announcements
- Engagements
- Anniversaries (Wedding & Work)
- Weddings
- Achievements
- Awards

Feel free to email your special announcements to newslettereditor@coloradoaccountant.org

IRS/Colorado Seminar

Doug LeNoue, douglenoue@mcleodusa.net

IRS/Colo seminar on Nov. 6, 2008 in Colorado Springs at the Clarion Hotel at the I-25 & Bijou St. exit.

Morning session is the IRS with tentative topics at this time is "Circular 230-2008-Style & We are in this Together", "Form 1099A & 1099C-Repossessions & Foreclosures", "TITGA presents "Phishing"-Don't get Hooked" and then at least one other topic (other possible topics are "Schedule C-Hot Buttons", "Return Preparation Standards-How confident are you?", "Tax Professional Standards-Making them work for everybody"

& "Compliance Priorities & Initiatives") coming to 4 CPE hours. The State of Colorado will be the afternoon session which will mainly exist of the 2008 tax updates and possibly (time

permitting) tax questions that can be e-mailed to Caron Notarmuzi (Colo. spkr) for her to research (total 4CPE hours).

Registration fees for PASC & NSA members is \$89.00 and \$109.00 for nonmembers. (includes continental breakfast, morning & afternoon break refreshments and also lunch)

Registration begins at 8:00 A.M. with the morning session starting at 8:30 A.M. Lunch at 12:00 with the afternoon session starting at approximately 1:15 P.M. The seminar should be through by 4:30-4:45 P.M. unless there are a lot of questions for the speaker. ■ PASC ■

Announcements, Continued from page 4

the Ramada Plaza Hotel at 120th Avenue and I-25, and a Board Meeting will immediately follow. The Bylaw Proposed Changes were distributed by email and those unreachable by email were sent this document by fax or mail.

If you are unable to attend this meeting, you are welcome to submit your vote through email or fax, on or before September 24, 2008. If you are an Active or Life member of PASC and have not received your voting information, please contact the PASC headquarters office.

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The Professional Public Accountant Society of Colorado

Officers

President – John V. Martinez, PA
 (303) 933-7849
john_martinez01@comcast.net

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 (303) 238-7930
ekozacek@aol.com

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 (303) 364-0400
bob@kuziak.org

Treasurer – Kirit P. Merchant, PA, EA
 (303) 922-5522
drdac@drdac.com

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judy@coloradoaccountant.net

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Lawrence M. Skolds, CPA
 (970) 498-0300
laskolds@lmsprotax.com

Chapter Officers

The Four Corners Chapter
 President/Treasurer – Barbara Blackburn, PA, ABA
 (970) 264-6644
 Vice President – Bill Morlong, EA, ATA, ATP
 (970) 884-5106
 Secretary - JoAnn Howell, PA
 (970) 264-5330

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 Vice President – John C. Hase, PA
 (970) 522-9231
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 Treasurer - Bob Childers
 (970) 353-2925

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 Vice President – Jean Moores, PA
 (970) 931-2802
 Secretary/Treasurer – Donna Myers, PA, ABA
 (970) 824-8836

PASC Committees

Education Committee – Chair: Jim Buck

Educational Seminars – *Activity Leaders:*

ACAT Outreach – *Action Leader:*

Convention – *Action Leaders:* Linda Marie Evans, Julie Packard

Governance – Chair: Gary Anderson

Finance and Audit – *Activity Leader* - Gary Anderson, Doug Le Noue, Barbara Blackburn, John Martinez (President), Mollie Wright, Kirit Merchant

Governance, Bylaws & Administrative Policy – *Activity Leader* – Alan Cartwright

Leadership Development – *Activity Leader* – John Martinez (President)

Ethics and Grievances – *Activity Leader* – Robert Childers

Governmental Affairs – Chair: Leota Jensen

Legislative Presence – *Activity Leader* –

Tax Liaison – *Activity Leader* –

Membership – Chair: Connie Martinez

Awards and Public Relations – *Activity Leaders* – Barbara Blackburn, Deanna Cross

Chapter Development – *Activity Leader* – John Martinez (President)

Communications and Website – *Activity Leader* – Kirit Merchant (Treasurer)

Membership – *Activity Leaders* – Connie Martinez

Newsletter – *Editor* – Lynette Myers

Nominations – *Activity Leader* – Donna Myers

More details and contact information can be found at: http://www.coloradoaccountant.org/pdf/Officers_and_Directors.pdf



2008 NCPE Workshops in Colorado - Sponsored by PASC

Date

Sept. 17 & 18, 2008

Wednesday & Thursday

Workshop Information

Corporation, Partnerships & LLC's Workshop

16 CPE Credit Hours

Members \$315, Non-Members \$345

**** Early Bird Registration**

Members \$290, Non-Members \$320

Location

Denver

Ramada Plaza

10 E. 120th Ave.

Northglenn, CO 80233

Phone: 303-452-4100

Fax: 303-457-1741

\$77 room rate

Colorado Springs

Clarion Hotel

314 W. Bijou

Colorado Springs, CO 80905

Phone: 719-471-8680

Fax: 719-471-0894

\$79 room rate

Sept. 18 & 19, 2008

Thursday & Friday

Corporation, Partnerships & LLC's Workshop

Prices and Credits same as above.

Nov. 5 & 6, 2008

Wednesday & Thursday

Individual Income Tax Update

16 CPE Credit Hours

Members \$315, Non-Members \$345

**** Early Bird Registration**

Members \$290, Non-Members \$320

Grand Junction

Doubletree Hotel Grand Junction

743 Horizon Dr.

Grand Junction, CO 81506

Phone: 970-241-8888

Fax: 970-245-8198

\$89 room rate

Nov. 10 & 11, 2008

Monday & Tuesday

Individual Income Tax Update

Prices and Credits same as above.

Durango

Doubletree Hotel Durango

501 Camino Del Rio

Durango, CO 81301

Phone: 970-259-6580

Fax: 970-259-4398

\$104, \$124 room rate

Nov. 11 & 12, 2008

Tuesday & Wednesday

Individual Income Tax Update

Prices and Credits same as above.

North Denver

Ramada Plaza

10 E. 120th Ave.

Northglenn, CO 80233

Phone: 303-452-4100

Fax: 303-457-1741

\$77 room rate

Dec. 2 & 3, 2008

Tuesday & Wednesday

Individual Income Tax Update

Prices and Credits same as above.

Southeast Denver

Embassy Suites

7525 E. Hampden Ave

Denver, CO 80231

Phone: 303-696-6644

Fax: 303-337-6202

\$119 room rate

Dec. 3 & 4, 2008

Wednesday & Thursday

Individual Income Tax Update

Prices and Credits same as above.

Colorado Springs

Clarion Hotel

314 W. Bijou

Colorado Springs, CO 80905

Phone: 719-471-8680

Fax: 719-471-0894

\$79 room rate

**** Early Bird Registration ends 2 weeks before Seminar**

Public Accountants Society of Colorado
PO Box 1078 Eastlake, CO 80614-1078



A D D R E S S



William D. Eskew Memorial Scholarship

The Pikes Peak Chapter of PASC has established the William D. Eskew Memorial Scholarship with the University of Colorado Foundation to provide need-based scholarship support for undergraduate students majoring in accounting.

If you wish to make a deductible donation on line to this scholarship fund, please go to the site listed below, or you can send a personal check to the Eskew Scholarship Fund at the address below.

CU Foundation
Campus Mailbox ADM6
P O Box 7150
Colorado Springs, CO 80933-7150

<http://www.cufund.org/giveonline/index.php?ID=99>

View the electronic version of
The Professional Public Accountant

on the PASC Web site:
www.coloradoaccountant.org

Articles for *The Professional Public Accountant* Newsletter are welcome and encouraged.

To submit, please e-mail
newslettereditor@coloradoaccountant.org

Announcements, *Continued*
from page 6

Mitch Abelman

- 1) officially retired July 1, 2008
- 2) He and his wife Marsha have moved to Portland, OR to be closer to their only child (Matthew).
- 3) He has sold his part of our practice to Jerry Laird, CPA (Laird & Associated, PC)

■ PASC ■



photo by Lynette DL Myers

Executive Offices

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