



The Bulletin

East Bay Association of Enrolled Agents

*A Chapter of the California Society of Enrolled Agents
Affiliated with the National Association of Enrolled Agents*

January 2026

Webinar:

Fri., Jan 30, 2026

12:00 – 1:00 PM – Webinar

Program: “Smarter. More Efficient. Fully Compliant: The AI Advantage for Every Tax Practice”

Register through the link in the email from EBAAEA sent on January 14, 2026, or call Patty Pringle, EA 925-320-7802

Cost: Free

This session doesn't offer CE credit, but we hope you'll find the information helpful and beneficial.

January Webinar: Smarter. More Efficient. Fully Compliant: The AI Advantage for Every Tax Practice

Speaker: Horatio Ulesco.

What you'll learn

- Why generic “business AI training” misses the mark for tax practitioners—and what a compliance-ready alternative requires
- A risk-tiered model ranking five AI use cases from lowest to highest risk in tax practice
- A live comparison of generic AI answers vs. primary-authority-supported, practitioner-grade responses

- Circular 230 requires tax professionals to maintain independent judgment, verify any information they use against primary authority, protect client identifiers, and ensure that any material incorporated into written advice is fully reviewed and meets professional standards.
- Practical next steps for solo practitioners and firms adopting AI in a controlled, defensible way

Speaker Bio: Horatio Ulescu

With more than 30 years of enterprise-technology leadership at Oracle and Sun Microsystems, he brings deep technical expertise and a proven track record of guiding organizations through major technology shifts.

Armed with an MBA, an MS in Engineering, Stanford AI training, and membership in the Association for the Advancement of Artificial Intelligence (AAAI), Horatio translates complex AI capabilities into practical, risk-aware solutions for tax professionals. He helps firms modernize workflows, strengthen confidentiality safeguards, and reduce liability exposure while maintaining the highest professional standards.

His mission is simple: make AI safe, accessible, and strategically valuable for every tax practice — from solo practitioners to multi-office firms.

PRESIDENT'S MESSAGE

by Gail A. Stan, EA, MBA, MLS

Happy New Year!

December 17, 2025, the chapter held our Christmas party at the Dublin Sunday School Barn. Not a large turnout but those who attended enjoyed the conversation, the food and the “Ugliest Christmas Hat” contest.

Now that it is January, we are all gearing up for tax season. The IRS has announced they will begin accepting efiled returns on January 26. Don't forget to order your Quickfinder.

The EBAEA Bulletin is now quarterly rather than monthly; published in January, April, July and October. And the “Coming Events Calendar” now includes several future months so that you can see upcoming events and plan accordingly. As I am the Editor of the Bulletin, please let me know what you like, don’t like or you think should be added.

ORDER YOUR QUICKFINDER

Order your Quickfinder through the Chapter and we receive a percentage of the total orders placed. Last year the chapter received \$173 from Quickfinder orders. Claire Flores clare@taxandpayroll.com is the contact.



January 2026

- 1 New Year’s Day Holiday**
- 13 EBAEA Board Meeting 4:30 PM via Zoom**
- 19 Martin Luther King Holiday**
- 21-22 IRS Practitioner Seminar - Virtual**
9:00 AM – 2:00 pm
Register through CSEA website
[IRS Practitioner Seminar 2026](#)
- 26 IRS Efile opens**
- 30 Free Webinar 12 PM – 1 PM**
“Smarter. More Efficient. Fully Compliant:
The AI Advantage for Every Tax Practice”



February 2026

- 10 EBAEA Board Meeting 4:30 PM via Zoom**
- 14 Valentine’s Day**
- 16 Presidents’ Day Holiday**
- 18 EBAEA Webinar - CA Tax Panel**
2PM to 4 PM via Zoom
Panelists:
 - Karen Brosi, EA
 - Angela Jones, FTB Taxpayer Advocate
 - Victoria Ramirez, CPA– FTB Taxpayer Advocate, Technical Advisor



March 2026

- 10 EBAEA Board Meeting 4:30 PM via Zoom**
- 17 St. Patrick’s Day**
- 18 EBAEA Webinar - Federal Tax Panel**
2PM to 4 PM via Zoom
Panelists:
 - Karen Brosi, EA
 - Joe Calderaro, EA
 - Sharon Kreider, CPA

April 2026

No Meeting – Everyone is too Busy!

May 2026

- 12 EBAEA Board Meeting 4:30 PM via Zoom**
- 20 EBAEA Dinner Meeting**
Election of Officers

Small Group Meetings

Small Group Tax Meetings

Danville Area 2nd Wed 8:30 am
Life is Sweet Bakery, 155 Railroad Ave, Danville,
Michael Power EA, CFP (510) 366-8836

Oakland Area (Near BART) 4th Tue 9:00 am
Buttercup Café, 229 Broadway, Oakland

Livermore Area 1st & 3rd Thurs 8:45 am
Via Zoom

Email-only Group
Michael Power EA, CFP
Send an email to mpower@powerinvesting.net to be added to the email group.

IMRS: The IRS System for Addressing Widespread Issues *by Phil Fiegler, EA*

IMRS conference calls are hosted by Stakeholder Liaison (SL). Our chapter representatives are Phil Fiegler, EA and Patty Pringle, EA. This overview explains what IMRS is, what types of issues it addresses, and how you can participate by submitting relevant issues.

IMRS focuses only on **systemic issues**, not individual case problems. To be considered, an issue must:

- Be systemic (recurring or widespread), and
- Be believed to be large-scale or national in scope.

The calls, previously monthly and limited mostly to Northern and Southern California, stopped in 2025 due to staffing losses. They are now restarting on a **quarterly** basis. The next call is scheduled for **March 11** and will cover **CA, AK, HI, OR, WA, NV, UT, and AZ**. Because of this broader region, any issue we present must be a prominent systemic problem. Resolution may be slower or may not occur at all—but our role is to submit issues and monitor what happens.

Patty and Phil are expected to:

- **Collect** systemic issues from members, and
- **Share** any information or updates received from IMRS with the membership.

Call participants are expected to bring issues, not attend empty-handed. If you have a potential systemic issue, you must **write it up and submit it to Patty and/or Phil**. We will review it to determine if it is appropriate to submit and may request additional details.

Before sending an issue, please ensure:

- **Clear explanation:**
It must be explicitly explained, well-organized, and understandable. We will only make minor grammatical edits; otherwise, we may return it for further development.
- **Systemic nature:**
It must involve a recurring or widespread problem you have encountered multiple times or discussed with others—not a one-off situation affecting a single client.
- **Thorough research (critical):**
The issue must be fully researched **before** you send it. Patty and Phil will **not** perform research for you. Your write-up should include:
- **Code sections**
- **Regulations**
- **IRM references**

The IRM is effectively the IRS's operating manual. Each issue should cite relevant IRM provisions and clearly explain how you believe they are not being followed or are being misapplied. The presentation should be organized, specific, and ready for submission. Please email Phil pf@philtax.com or Patty patty@east-baytaxmatters.com

CSEA News

At the CSEA Board meeting on January 10, 2026, The Board approved the following:

Tiered Dues Structure

Membership dues are not payment for goods and services received. Members pay dues to financially support the organization and its work. The proposed structure adds two additional dues tiers to allow Members to choose higher levels of support. ***It is important to note that the tiered structure for dues does not impact membership types.*** CSEA continues to have two types of members (Members and Associates).

- Practitioner tier – dues would remain unchanged at \$295.00
- Advocate tier – dues would be \$495.00
- Champion tier – dues would be \$795.00

Each tier includes all the member benefits that currently exist but have added benefits and recognition for Members who choose to support CSEA at either of the two higher levels. Final determination of the additional benefits has not yet been made.

2025 - 2026 Board of Directors and Committee Chairs

To contact any of the Officers & Volunteers below other than the Bulletin Editor, email the Chapter Office ebaea@ebaea.org and the email will be forwarded to the appropriate person.

(We have removed members email addresses as they are being used by scammers to request inappropriate financial payments and other scam practices.)

President: Gail Stan, EA
1st VP: Patty Pringle, EA
2nd VP: Peggy Hall, EA
Treasurer: Eric Vale, EA
Secretary: Katherine Judd, EA
Immediate Past President: Sharon Hinchman, EA

Directors:

Greg Crofton, EA, MBA
Lourdes Rabara, EA
Carolyn Krieg, EA
Jerrilynn Krebs EA
Pam Bayer, E
Rachel Weil, EA

CSEA Director: Sharon Hinchman, EA

Education Committee
Chair: Patty Pringle, EA

Communication Committee
Chair: Gail Stan, EA
Bulletin: Gail Stan, EA, EBAEA.Editor@gmail.com
IRS Practitioner Panel: Patty Pringle, EA
Membership: Peggy Hall, EA
Quickfinders: Clare Flores, EA
Website: Patty Pringle, EA

Administration Committee
Bylaws/SOP: Gail Stan, EA
Audio/Visual Technical Advisor: Eric Vale, EA
Chapter Office Administrator: Patty Pringle, EA
Nominating: Sharon Hinchman, EA



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Web Page <http://www.ebaea.org>

The East Bay Association of Enrolled Agents (EBAEA) typically meets monthly on the 3rd Wednesday of each month except for the month of April. Occasionally, this may change for an individual month depending on the availability of our guest speakers. Watch for emails from "East Bay Association of Enrolled Agents" for details and registration.

Board of Directors' meetings are currently being held on the 2nd Tuesday of each month at 4:30 PM using Zoom. If you would like to attend a Zoom Board Meeting, please contact Patty Pringle at the EBAEA office so that she can include you and send you the link for the Zoom meeting.