

California Chapter of the National Association of Tax Professionals  
Minutes of the 2013 Annual Conference - 10/24/2013

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**Call to Order:** at 3:30 p.m. by Laura Strombom

**In Attendance:** Laura Strombom, Jim Vann, Rich Moring III, Jen Horton, Rebecca Neilson, John Girlando, Chris Basom

**Excused:** Mike Vargas

**Guest:** JoAnn Schoen

**A quorum of the Board of Directors was present.**

Laura Strombom, President, welcomed attendees and thanked them for coming. Each member in attendance introduced themselves.

Rich Moring passed out the ballots for members to vote in the 2014 Directors. This being the first election in some time, members are voting for 3 Directors 1 Year Term, 3 Directors 2 Year Term, 3 Directors 3 Year Term.

Rich Moring also handled voting for the National Candidate election; the results for this election will be given to our Chapter President who will cast the California vote at the National level.

Laura Strombom introduced our Guest Speaker for this event, JoAnn Schoen, President of the National Association of Tax Professionals, from Minnesota. JoAnn spoke to the California members on National's role in supporting their many Chapters, and their mission statement for education of the tax professional community. JoAnn invited attendees to speak to her after the conference if they have questions which aren't covered in her presentation, and thanked members for supporting their chapter.

JoAnn's presentation covered some of the benefits of NATP: 1) webinars, optional total webinar package purchase; 2) the "One-Free-Federal-Tax-Research-Answer-Per-Year" for help with difficult tax situations; 3) Possibility to contact *other Chapters* for State-Tax-Research-Answers; 4) the website with features such as whitepapers, research and survey results; 5) eMemberships for firm employees.

Some Interesting Facts JoAnn provided for the California Chapter: 1393 members as of August 31, 2013, 30% of members are within 30 miles of Los Angeles, 17% of members are within 30 miles of San Francisco, and 8% of members are within 30 miles of San Diego.

NATP is looking to get into the post-secondary education sector to promote the tax profession to bring in fresh talent, and also looking toward veterans coming out of the military searching for a new profession.

The NATP National Conference for 2014 is in August in Orlando, Florida; for 2015 it will be in New Orleans. The NATP Tax Forum for 2014 will be in September.

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**CA Chapter NATP Election Results**

**1 Year Term:** John, Jen, Barbara

**2 Year Term:** Rebecca, Carmen, Jim

**3 Year Term:** Chris, Rich, Laura

**National Candidate Election Results**

JoAnn Schoen, Brett Rosser, Kim Loewer, Jean Millerchip are the member choices the California Chapter President will cast a vote for in the NATP Election.

President Report – Laura thanked Jen & Rich for their work in completing the revivorship process with the State of California, with all back tax returns and Secretary of State information returns having been filed. 108 members responded to a Chapter survey which will help Directors focus on future localization of chapter meetings.

Treasurer's Report – Rich reported the Chapter has opened a bank account, has received funds held in trust by National after the prior board disbanded, and are receiving quarterly payments based upon membership and dues. These funds allowed the Chapter to host the 2013 Annual Conference.

Membership Report – Becky invited attendees to take membership packets home with them and invite their peers to join, and pointed out National pays out bonuses for bringing in new members.

Education – Jim, Chapter Vice President, asked all attendees to complete the education evaluation form in their packets.

Government Relations – John noted he has a subscription to State Tax Analysts through National, which will allow him to receive state tax updates quickly, which he may then pass on to the membership. For 2014 John plans to establish relationships with FTB.

Hearing no objections, the meeting is adjourned at 4:52 p.m.. Hors D'oeuvres are available in the back.