

November Chapter Report: Greater Long Beach

1. Chapter Dates: July 29, August 26, September 30, October 28, November 18. See Greater Long Beach web page for details.
2. Board Members: Dennis Kaho, Frank Farfan, Shobha Bajaj, Inge Boekenhauer, Fran Oatridge, Harold LeMaster, Eric Sanchez, Gilbert Sao, Tamaki Okamoto, Nicole Lebrun. See Greater Long Beach web page for details.
3. Membership Ideas: All chapter members are encouraged to network with others they know in related tax support professions such as, payroll, bookkeeping, investments, legal.
4. New Ideas: Suggest focus groups for related tax return topics such as bookkeeping basics, payroll basics and investment basics.
5. Chapter Concerns: Several of our chapter members do not receive e-mail information from the Society office. This has been an ongoing issue for over three years with no resolve. Cursorily, they always receive their annual request for membership \$ by e-mail?

Post-Event Reporting: "Course Sign-In Sheets" in Excell format-This is NOT a SIGN-IN SHEET. Never has been and, never will be. The Excell sheet is a representation of Attendance Record. Rod Coutts had agreed to this and had "promised" to correct this several years ago. Still not identified as to what it represents.

Continuing issue of not being able to submit support documents on Post-Event reporting page:

- Unable to submit course handouts.
- Unable to submit Evaluation Form *
- Event Advertisement comes from Society Office.
- Certificates of Completion are issued by Society "Office". Office already has this copy. Rod Coutts had agreed to this several years ago and had promised to remove from Post-Event page.

We were promised several years ago that a Chapter Administrative page was being developed? Chapter meeting minutes (unrelated to education) is still on the Post-Event page?

Continuing issue of having Education Events misrouted or missing to CTEC and IRS. Other chapters have also shared this issue with us.

Dennis Kaho- President, Greater Long Beach Chapter