

## Notes from the November 2013 Affiliate Presidents Exchange (APEX) Meetings

The most recent APEX meeting was held in Orlando, FL, in conjunction with the NAEA Board of Directors Meeting, November 6-9, 2013. I had the opportunity to attend the APEX Meetings as part of my responsibilities as the NYSSEA Executive Director. I have always found these meetings to be the best for networking with other affiliates in a collaborative and non-threatening environment. The meetings are always well-organized and move along at a good pace.

One of the first things we did at these recent meetings was called "Bring and Brag". It took most of the first afternoon and the following morning to get through all participating affiliates, as each shared some of the recent happenings in their state. Some states even prepared PowerPoint presentations to highlight their accomplishments. I was able to share many exciting things about NYSSEA. I have attached the notes from my presentation at the end of this report. California presented a new program they are instituting to grow their membership. The "Just Ask One" program asks every member in every Chapter to reach out to one EA in California and invite them to become part of their professional community. It is a very comprehensive plan to grow membership and I have forwarded this information to NYSSEA Membership Chair, Patrick O'Hara, EA. California has also made attempts to get more members to regular Board meetings. Using WebEx, an online conferencing system, they were able to attract about 65 members to a recent meeting. All you need to participate is the login code, headsets, high-speed Internet, a webcam and an up-to-date computer.

Georgia (GAEA) shared some interesting initiatives that they have put in place. Their web site is worth taking a look at and I have already begun discussions with their Webmaster to bring some of their applications into the NYSSEA web site. They recently held their Board elections online and there may be a way for us to do that, as well. I am checking with various electronic voting services and the Board will need to decide if it is worth the cost – which could be \$500 or more. They also have a wonderful interactive map of ALL member EAs in their state and I have already had conversations with both the GA Webmaster and the local web developer I used for our NYSSEA web site. They will be working together with me to try to create a similar map for us, something that will be useful for both Chapters and members, not to mention any individuals visiting our site and looking for an EA in their area of the state. GAEA and many other state affiliates also have a "Members Only" area on their web site and I am looking into that for the NYSSEA web site, as well.

Indiana (ISEA) shared how they train their employers from internships to enrolled agents. Andy Stadler shared that he used materials from TaxBook to train employees in tax. Massachusetts (MaSEA) shared a "Favorite Benefit Brochure" that they use to foster membership.

Also included during this time was a review of the membership area of the NAEA web site and all that is available to affiliates. There was a discussion on how NAEA should come up with a consistent format for setting up booths/tables at various conferences and meetings. This discussion also led to affiliates possibly getting a similar packaged set-up.

Other discussions over these two days included a presentation by Terry Durkin, EA on the Task Force for SEE and tax education efforts through NAEA, How to Deal with Problems on a Board (How do we Recruit and How do we Get Rid Of), Board Development through Social Media (including etiquette), and the NAEA PAC.

In between sessions, we saw and heard presentations from APEX Sponsors: GLEIM, Fast Forward Academy and Get.Net.Set. Get.Net.Set has formed a partnership with NAEA to offer FREE web sites to all affiliates (State and Local Chapters). They are ready to help any affiliate chapter set up a web site but the affiliate would then be responsible for maintenance of the site.

**Notes on NYSSEA Accomplishments - presented by Jeff Gentner, EA,  
Executive Director/NYSSEA**

**NYSSEA Accomplishments --- to Note at the November 2013 NAEA APEX**

The new NYSSEA web site was launched in December 2012. To date, we have about 4400 visitors per month.

The NYSSEA Blog, which was launched as part of the web site, has proven to be an effective communication tool. 32 items have been posted on the BLOG in the past 12 months. Members seem to prefer this method of communication instead of the e-blast approach, which was used in the past. With the combination of e-blasts and the BLOG, we feel confident that we are keeping in touch with our members.

A new NYSSEA Chapter was formed this past year, making the total number of chapters in New York State – 7. The Mid-Hudson Valley Chapter was formed since it was found that EAs on the one side of the Hudson River were not travelling to meetings of the Lower Hudson Valley Chapter due to distance issues. With the formation of this new chapter, we are able to attract about 15 EA members who were not previously attending meetings. NYSSEA is now looking into other areas of our state where we might grow.

Continuing Education: So far, for 2013, NYSSEA has had 85 CE courses approved by the IRS and NYSSEA has issued certificates for over 4200 CE hours.

In response to the Hurricane Sandy disaster, NYSSEA leaders stepped up and organized a Casualty Loss Seminar – which was given at 3 strategic locations.

The NYSSEA Google Group continues to be the “go-to” immediate response system for our members. Since it began a little over 2 years ago, 185 members have made 3000 separate inquiries. There were an average of 5 responses to each inquiry.

One NYSSEA Chapter has arranged a Webcast for the IRS update scheduled for January 2014.

Lastly, our recent NYSSEA Annual Conference brought in 25 new attendees.