



## *Not Your Basic Bean Counter* *Newsletter*

Michael A. Gordon, CPA, LLC

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### FRONT PAGE NEWS.... MIKE'S GLOBE-TROTTING DAYS ARE OVER

As most of you know, I have been teaching tax seminars to other tax professionals for the last 5 years. From September through December of each year I was criss-crossing the country doing this.....gone 4-5 days a week. It was crazy, exciting, educational, stressful and more!

About 3 weeks ago, after some hard soul searching (and some nudges from Rhoda) I called up the organization that puts on the seminars and told them that I would be bowing out for the coming year.

This was a difficult decision for me. However, as our client load has increased, it became apparent to me that I needed to be much more available to my staff and my clients. So I did the right thing....I quit....nicely, of course!

#### **I will be a LOT more available.**

My staff is still pondering whether or not that's a good thing! Just when they were getting used to me being away so much.....now they have to re-adjust. I feel so sorry for them. However, it will mean that I am going to be so much more available during the last quarter of the year for my clients. I am really excited about that.

**SO...I HOPE TO SEE A LOT MORE OF YOU THIS FALL!!**

## CLIENT SEMINAR ANYONE?

I know, from talking to many of our clients, that the client seminars we used to have were a real hit. Now, I'm no dummy....I know darn well that the big draw was Rhoda's goodies, not my fantastic sparkling personality, or my fabulous wit and outstanding tax knowledge!! Oh well. At least I'm not deceived.

So, now that I will be here so much more in the Fall, my office agrees that we need to do another client seminar (and, yes, of course we'll have to get lots of Rhoda's goodies). After tax season we will gather and discuss when might be a good time to do it...and where.

Here's where you come in. I would LOVE some ideas for the event. Rhoda's going to have the food thing taken care of. But....are there any topics of particular interest to you that you would like to see me cover? I will probably plan on talking for no more than 1/2 hour to 45 minutes ('cause I know y'all want to get at the food). In addition, should we have some fun and get all of our clients to bring "stuff" that we can give away? If you don't mind, would you email us with any suggestions? Or you can walk a letter in...or, gulp....you can even snail mail it!





## RHODA'S CORNER

*In honor of Tim & Ilana's 5th anniversary, I am reprinting Rhoda's food article from then! They now have 2 beautiful daughters, Alice and Lucia, as seen above.*

### Tim and Ilana's Wedding Soup

In January 2009, Ilana and I (Ilana, our second daughter, wearing a sparkling, newly-minted ring on her left hand) and Anjo Mills, mother of Tim Mills, went looking for the perfect venue for a late February wedding. Perfection, in February, requires thinking “in” the box rather than “out of” the box, so we trudged around looking for something with a roof, four walls, loads of charm and the where-with-all to pamper 200 guests. Later, after a day of it, we were going through lists of pros and cons when Ilana suddenly said, “these are all just *buildings* and what I really want is to be married at home.”

As we talked, a plan took shape. Tents and all that, of course, but the compelling question for me was, what will we feed our guests? Food equals love, and especially so for a wedding celebration! Ilana had already decided that she wanted soup—a soup board, actually—with big pots of soup and big baskets of rolls. Which soups, though, when there are so many to choose from?

We decided to have three soups, and one would be Ilana's favorite, Carrot Ginger, but what about the other two? We dithered and discussed, back and forth, for several weeks. Many trial pots of soup later (and with a lot of feedback from the Thursday lunch bunch), two winners emerged: Chicken Mulligatawny and Seafood Bisque.

The week before the wedding, our little farm became both hub and hubbub as the final countdown began. We had done our best to plan for rain, but the sun shone magnificently as two big tents were set up, as last-minute landscaping was installed, as lights were strung. We were even able to sit outside for hours, in our shirt-sleeves, cracking thirty freshly-cooked crabs for the Seafood Bisque.

The Saturday before the wedding was partially overcast and a bit drizzly, but the predicted rain was a no-show--

perfect soup weather, and a wonderful day. So, here's the Mulligatawny soup.....

### Mulligatawny Soup, adapted from a recipe in Bon Appetit

#### 12 10-oz. servings

4 garlic cloves, minced  
¼ teaspoon cumin seed, ground  
6 whole cloves, finely crushed  
1 Tablespoon curry powder, or to taste (I added more, maybe another Tablespoon if curry powder is mild)  
¼ teaspoon ginger, ground  
Cayenne pepper, to taste  
¼ cup unsalted butter (1/2 stick)  
1 (4 lb. approx.) roasting chicken, cut into serving pieces  
3 stalks celery, with leaves, thinly sliced  
2 large onions, chopped  
2 carrots, diced  
1 leek, thinly sliced (white part only)  
11 cups chicken stock, defatted (homemade if possible, 2 quarts plus 3 cups)  
Salt and freshly-ground pepper  
2/3 cup long grain rice  
2 medium apples, peeled, cored and diced (tart)  
1 cup plain yogurt  
2 Tablespoons fresh lemon juice (or to taste)  
2/3 cup coconut milk, from can  
Chopped fresh parsley, to garnish  
Lightly toasted sliced almonds, to garnish  
Mango chutney, from jar, to garnish

Combine garlic and spices. Melt butter in large skillet over medium-high heat. Add chicken and sauté until lightly browned on all sides. Transfer chicken to stock-pot. Drain all but 1 Tablespoon of fat from skillet. Add celery, onion, carrot, leek and spice mixture and blend well. Add a small ladle of stock and cook over low heat, stirring constantly, until vegetables are tender. Add to chicken, stir in remaining stock and season with salt and pepper. Cover and simmer 30 minutes. Remove chicken with slotted spoon and set aside. Add rice to soup and continue cooking for 15 minutes. When chicken is cool enough to handle, cut meat into bite-size pieces, discarding skin and bones. Return chicken to soup and blend in apples and yogurt. Simmer 10 minutes. Degrease soup if necessary, stir in lemon juice and coconut milk. Taste and adjust seasoning, adding more lemon juice, cayenne, salt and pepper if necessary. Pour into heated tureen and sprinkle with parsley. Serve with toasted almonds and chutney on the side.

## **CLIENT SPOTLIGHT**



From time to time, we will be doing a “client spotlight”. In this newsletter we will spotlight Bandon Golf Supply. Owner, Cathy Underdown has been in Bandon since 1999. She moved there with her husband Steve (who passed away a few years ago), and their kids (twins, Max and Darby, who are now 16 years old).

Cathy grew up in Eagle River, Wisconsin. She has been a client of our firm since 2001...and she still loves us! And, of course, we love her just as much.

Her kids refer to her as “Chatty Cathy” because it takes her forever to say goodbye at a social function...or the grocery store. Hmmm.

Bandon Golf Supply is located in the Bandon Shopping Center at the intersection of Hwy 101 and 42S. It specializes in everything golf. That would be “hard goods” (clubs, bags, carts, balls, etc.) and “soft goods” (shoes, gloves, rain gear, clothing) and “accessories” (range finders, GPS units, tees, training aids) and gift items. Cathy recently told me that she would like to open a fine wine shop in Bandon and may pursue that dream soon. That would be awesome!!

She would love to see each and every one of you stop by her store...even if you are NOT a golfer (they have lots of cool clothes and gift items).

We hope that Bandon Golf Supply will continue to flourish and serve our community for many years to come.



### **Bandon Golf Supply**

120 Michigan Avenue  
Bandon, Oregon 97411

541-347-1636  
[www.bandongolfsupply.com](http://www.bandongolfsupply.com)



Cathy Underdown

## **APRIL 15 IS COMING TOO FAST!**

The IRS made sure that filing season got off to a rather late start this year (of course, they blame it on Congress). I don't really care—and neither do you—who is to blame....the result is the same. There will be many more extensions this year as tax professionals struggle to get returns done.

This is not news to most of you as we have had this discussion before....but, we just wanted to remind everyone that we are working hard to get as much done as is humanly possible before April 15. If we fail to get yours done, please be patient and understanding with us! If we can't get yours done by then, we will be calling you and going over what is needed, if anything, so we can properly file the extension request. There will be LOTS more returns extended this year, all across the country.

Remember, always feel free to call us if you have ANY questions about this. We love talking to you!

## A Timely Reminder



***Certain things are OK to forget about, let slide, fall through the crack, etc.....  
And, then, there are those things that are NOT okay for that!***

There are some very common things that taxpayers tend to forget about that can cause some serious problems down the road. These are NOT okay to let slide! Let's look at 2 of them.

### **1. Wills**

Are your wills up to date? Do you even know what your assets are and what they are worth? If you died tomorrow do you know what will happen to your assets? Who will get them? Will they have to go through probate? Will your beneficiaries end up fighting over your "stuff"?

Don't take those questions lightly. Many of you who already have wills need them to be reviewed and possibly revised. For example, you may have had your wills updated when you lived in another state (years ago). But now you live in Oregon...with different rules. Has anyone familiar with Oregon law looked at your will to see if it still holds water and will accomplish what you want it to?

By the way, I do NOT do wills. That's the job of a good attorney. Don't call *me* about this!

For those of you who don't have a will, that may have made sense some time ago. But...maybe over the years you have accumulated enough assets that it's time for a second look to see if it makes sense now.

Anyway, you get my drift, right? Certain things are okay to let slide. Not this.

### **2. Beneficiary Designations**

Here's another big one. Let me illustrate a nightmare for you...one that happens regularly.

Jim and Sue have been happily married for 25 years. 20 years ago Jim listed Sue as his beneficiary on a \$500,000 life insurance policy. This year, Sue goes kind of nuts and the end result is a nasty divorce. They did the divorce themselves....saved lots of attorney fees. Well, nobody even thought about the life insurance policy. Jim just keeps on paying the annual premium. Next year, Jim remarries...to a gal named Barbara. Of course, in his mind he is through with Sue and figures that, when he dies, everything will go to Barbara. **WHOOPS!** As fate would have it, Jim dies in 2 years.

Guess who gets the \$500,000 from the life insurance policy? Sue. Is that what Jim wanted to happen? I think you get the point.

My recommendation? Make a list of insurance policies, retirement plans, etc. and review your beneficiary designations. Do it today!

**HOPE THIS HELPS.....DIDN'T MEAN TO SCARE ANYONE!**