



# Mid-Willamette Chapter

Volume 5: Issue 1

January 2007

## Meetings

January Meeting will be **1/17** in **Albany** - at **Novak's**, 2306 Heritage Way SE (next to GI Joes on 14th across from the Mall.

**February Morning Meetings will also be at Novak's**

Our January Monthly meeting will be at **Novak's** restaurant in Albany. Come early for a no-host dinner beginning at 5:45. Business meeting will follow at 6:30. Education will begin at 7:00.

## Inside This Issue

- Presidents Corner.....1
- Education ..... 1
- Member Bio ..... 2
- News from the Editor ..... 1
- General Business
- Meeting Minutes .....3
- News from IRS.....2
- Want Ad (paid advertisements) .....3

### Newsletter Contact

Jo Anne Vetter  
541-981-0631 / fax 541-369-2411  
e-mail: [joanne@libertytax.com](mailto:joanne@libertytax.com)  
**Deadline:** Please submit information by the first week of the month

## President's Corner *Message from the President*

Happy New Year

Well I hope you are starting out towards having a Happy New Year. Software is here or should be here soon. All of the last minute law changes are done unless Congress in its infinite (?) wisdom sees fit to make even more retroactive changes. ODR says they will be ready this year to process returns as soon as we can electronically file them. Thanks to Kari we all have had the opportunity to be aware of the needs of ODR regarding WFC, so hopefully we will not have a delay of six to eight months in receiving refunds.

This month we will be having an IRS update. I urge you to attend so as to be ready for this tax season. This should cover all last minute changes that we have waited for since August.

FYI - If you need an additional QuickFinder the Portland office has a few extras as of the time I am writing this. Call Carole at OATC (800) 478-4943 immediately if you are interested. Carole will quote you a price which will include shipping. Once the extras are gone they are gone and we will not be ordering any more. All of the group services orders are in and have been distributed.

Also, get ready for the morning meetings starting in February. These will be in addition to the regular monthly evening meetings. The morning meetings will be a moderated round table form as required by the tax board.

See you at the meetings.

Ave



 This month's education will be an IRS Update and will be in Albany at Novak's.

Please remember to let me know if you have any suggestions for upcoming education. You can send your requests to me via email: [Mom@thelasswells.com](mailto:Mom@thelasswells.com)

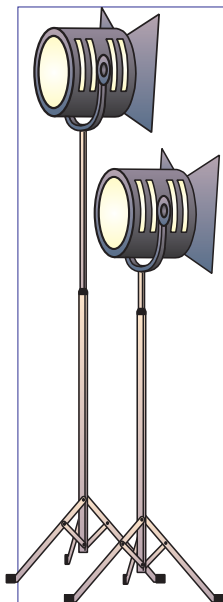


### News From the Editor

Have you signed up for the e-mail version of the newsletter yet? If not do so this month and help your club save the cost of postage!

My e-mail address is: [joanne@libertytax.com](mailto:joanne@libertytax.com). If you would also like to pick up a hard I will print extras and bring them to the meetings...

## Member Bio... Linda Harding



I was born in Pennsylvania more years ago than I care to remember and moved to Oregon when I was 10. I went to Albany schools and Oregon State University graduating in 1969 with a B.S. in Business Administration. After graduation, I worked for a national CPA firm in Salem ( Touche, Ross, Bailey, and Smart - I told people I was "Smart"). I moved to Montana with my husband Martin and was accountant for the Montana Deaconess Hospital in Great Falls, a job I really enjoyed. Martin was in the Air Force so we moved around a bit. After our move back to Oregon, I worked for several local CPA firms and taught tax and bookkeeping at LBCC before starting my own tax firm in 1982. I have continued to do review work for several local tax offices since then.



I have been married to Martin, who is the Linn County Bridge

Supervisor, for 37 years. We have two children, Joe, who lives in Las Vegas, and Jenny, who lives in Dallas, and one lovely granddaughter, Kaylee. We have a 1929 Model A Ford (among other cars) and are heavily involved with the local Model A Chapter, the Enduring A's, and the national Model A Ford Club. Martin takes care of the cars and Jenny and I do era fashions. Every year we take a week or two and travel in our Model A around the Northwest. We have been as far away as Calgary, Alberta, Canada, Surrey, B.C., Canada, and Reno, Nevada. Last summer Kaylee (at 8 months) went with us for her first regional Model A meet in Kennewick, WA. After retirement, we are looking forward to more traveling.

### News From The

# IRS



It is now possible to e-file a return with an ITIN/SSN mismatch.

In the past, if a client had an Individual taxpayer Identification Number but the Form W-2 showed a Social Security Number, the tax return was required to be filed on paper. E-file rules did not permit an Electronic Return Originator to alter information on a wage document, and mismatched taxpayer identification numbers would cause an e-filed return to reject.

Due to programming changes the IRS' e-file system can now accept these returns, but tax returns filed under an Individual Taxpayer Identification Number

which report wages paid to a mismatched Social security number are required to show that SSN.

The taxpayer's correct ITIN should be used as the identifying number at the top of Form 1040.

When inputting wage data, the mismatched SSN number should be entered exactly as shown on the Form W-2 issued by the employer.

reference:

<http://www.irs.gov/taxpros/article/0..id=165705.00html>

.....

**The IRS announced that it will begin processing both e-file and paper tax returns that include claims for the major extender provisions on Feb. 3rd.**

These Extender provisions include: deductions for state and local sales taxes, higher education tuition and fees, and educator

expenses.

Any other tax returns for individuals that do not claim the extender provisions can be filed as normal this month.

There are procedures for people using a paper 1040 and claiming the key extender provisions available on the IRS website.

.....

**Modernized e-File Available for Partnership Returns**

IR-2007-02, Jan. 8, 2007

Beginning today, partnership taxpayers can electronically file tax year 2006 Form 1065, U.S. Return of Partnership Income, and Form 1065-B, U.S. Return of Income for Electing Large Partnerships, using the Modernized e-File platform.

Partnership taxpayers can access detailed information about Form 1065 e-File process on the IRS website.

*We will be including a copy of the previous month's General Business Meeting Minutes in the newsletter so that those of you who can't make it to the meetings have the opportunity to keep yourselves informed.*

---

**Mid-Willamette Chapter  
Oregon Association of Tax Consultants  
General Business Meeting  
Wed. Dec. 20, 2006**

**Location:** King Tin Restaurant , Corvallis, OR

The meeting was called to order by President Ave Giddings at 6:30 pm

The minutes were presented in our newsletter, minutes approved.

**The Treasurer's Report was presented and approved**

Total checking \$4532.69

Total current assets \$10,452.34

There were 33 members present

**Unfinished business:**

Education: Next month's meeting will be an IRS update and will be located at Novak's in Albany.

Morning meetings: Kari will look into having morning meetings in January, February, and March. A decision will be made as to whether these meeting will involve education hours or not.

Portable speaker system: Tom found a system. Ave will go look at it before we make a decision.

**New business:**

Judy Lasswell shared information on ITINs. You must sent **original** documents in order to apply for an ITIN. If we have certified agents in place then you may use them to apply for the ITIN. Judy has become an authorized agent if you would like to use them. Keith, from ODR, said that he believes there is a possibility of applying for the ITIN through the Salem offices.

New members: Bill McKinney would like funds for postage, flyers, etc. to send out to encourage new members. Tom Dundas said that there is money in the budget for that.

Convention: coming up in June, it will provide 20 hours of education. Education includes partnerships, and small business.

There being no further business the meeting adjourned at 6:50 pm.

The education was presented by Keith Shribbs from ODR.  
Topic: Oregon Update

Respectfully submitted,

Brandie Stucky - Secretary

## from the Oregon Department of Revenue

Oregon will accept State Only returns this year.

Oregon will accept the ITIN returns from IRS as well as the "E" or exception processing returns from the IRS

Oregon will provide acknowledgements over the weekends and holidays this year. This service will begin on feb. 2nd.

Stacey  
Oregon Dept of Revenue  
Personal Tax & Compliance Div  
Elec Filing Coordinator

This newsletter is accepting paid advertisements - please contact Ave for pricing information and give your ad details to the newsletter editor - Jo Anne Vetter. You can email, fax, phone or get your ad information to me whatever way works for you.

*Paid Advertisement*

**LICENSED TAX  
PREPARER OR  
CONSULTANT WANTED**  
Full Time and part time  
positions available.

Knowledge of Lacerte tax  
program would be helpful but  
not required.

Please contact Monica at  
Donna Banks Income Tax  
Service: 928-9628 or 928-  
9265 or fax resume to 541-  
926-4425.



Mid-Willamette Valley Chapter  
C/O 31551 Oak Plain Drive  
Halsey OR 97348

Return Service Requested

***Contains Dated  
Material***

**DISCLAIMER:** *All material enclosed in this newsletter is as accurate and reliable as we can provide, but the possibility of human or mechanical error does exist. All persons using this information are cautioned to use all sources of information to arrive at a decision of tax law.*

### Association Officers

<u>Office</u>	<u>NATC</u>	<u>OATC</u>	<u>MW Valley Chapter</u>
<i>President:</i>	Jayne Williams 541-343-5336	Denny Purkey 503-620-3061	Ave Giddings 541-926-7382
<i>1st VP:</i>	John Bell 503-626-3342	Susan High 503-655-3737	Sharon Starr 503-394-2788
<i>2nd VP:</i>		Neil Gibson 503-232-9050	Kari Lasswell 541760-0124
<i>3rd VP:</i>		Eric Arnoldus 541-963-8304	
<i>Secretary:</i>	Barbara Culver 253-859-8567	Marie Dunkeson 541-884-1219	Brandie Stucky 541-541-8299
<i>Treasurer:</i>	Michael Graves 360-588-8077	Janet Dotson 541-343-6502	Tom Dundas 541-258-5600
<i>Board Members:</i>			Linda Harding Bill McKinney Nancy Kelley
<i>Past President:</i>	Linda Mussen 503-292-6252	Dave Kim 503-291-2570	Cynthia Clark 541-466-3144