



Mid-Willamette Chapter

Volume 5: Issue 2

February 2007

Meetings

February Meeting will be 2/21 in **Albany** - at **Novak's**, 2306 Heritage Way SE (next to GI Joes on 14th across from the Mall.

March and April Morning Meetings will also be at Novak's

Our February 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
News from ODR	3

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Deadline: Please submit information by the first week of the month

President's Corner *Message from the President*

Well it's February and tax season is really here. The state unemployment forms are out so we can do returns. Check out the enclosed story about fraud in the telephone tax refunds, they are watching.

Mark your calenders for upcoming meetings. The breakfast meetings are the first Thursday of each month at Novak's. Next morning will be March 1,2007.

Be sure to bring your problems to the evening meeting February 21, 2007 and see if everyone can help. We will be having a structured round table discussion.

The state is up and running and were fully caught up as on 2 weeks ago. This should relieve the late state refunds except for working family credit returns.

See you at the meetings, the break is needed and deserved, so come on out the food is very good. I am told that the deserts are also good. ☺

Ave



This month's education will be in Albany at Novak's. We will be having a structured round table discussions - you will receive 2 hours of CPE. March's education will be the same.

We will be having Safety Net in May - speakers will be Tracey Gates and Trent Toler. Education will cover investments, especially Schedules B and D. Safety Net will be held in Albany.



News From the Editor

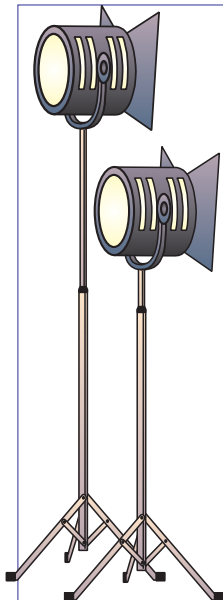
Have you signed up for the e-mail version of the newsletter yet? If not do so this month and help your club save the cost of postage!

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

Please let me know if you have something of interest you would like to see published in the newsletter.

Member Bio... Bill McKinney

Page 2



I was born in Long Beach, CA in 1958. We lived in Santa Ana until 1963 when my Dad went to Viet Nam for the first of two tours. My Mother and my four Sisters moved to Medford where my Mom's parents lived. In 1965, when Dad came home we moved to this little town (only 16,000 people) east of San Diego called El Cajon. When I graduated from High School in 1976 my Graduating Class (from my High School) had nearly 1000 kids in it and we were one of 9 High Schools in our District. I joined the Marines, like my Dad, and worked as an Aircraft Electrician on KC130 Refuelers for 4 years.

After being honorably discharged I went to work for Ma Bell. I worked as a Test Desk technician and went to College full time to get my Bachelor's in Computer Science. 14 years later when threatened with Corporate Downsizing and after a failed first marriage I left San Diego and moved to Oregon.

I moved to Medford in 1994 where I met Debbie at a Church work party. I continued my involvement with computers and data analysis, working for Jackson County and another small company in Medford. Debbie and I Married in ma of 1995 and in November of 95 we moved to Lebanon. We both worked for the Lebanon School district for a while and then she joined Peggy Dooley and took over for Joyce Metge, as she retired.

It was during this next year that Peggy and Debbie suggested that I get my Tax License and I could work with them for a few years. I started with H & R Block for one season and then an opportunity arose and I joined Debbie at our own tax business. Peggy retired and I was now a brand new Partner. Two years later I acquired by LTC and I am still continuing to reach for additional licensing. I studied towards my EA this Summer and am waiting for the results at this time.

Over the last 8 years I have worked with OATC and held the office of Chapter President for one term and thoroughly enjoyed myself. I worked on the Group Services team and as Convention Vendor chair as well. I enjoy learning, teaching and traveling, and hope to expand our Tax Practice into a situation where we can do more of that as time goes on.

I also continue to work in the Computer industry and am currently working as a Desktop Technician at the National Energy Technology Labratory in Albany, as well as I own a small computer consulting and repair business.

I truly enjoy working with all of the folks in OATC, in our Chapter, and in other chapters as well.



This is to let you all know that Bill McKinney just got his notice that he passed his exam to become an EA "Enrolled Agent".

Congratulations to him!!!! Some of you were aware of his studying last fall, and it paid off. He passed all three parts!!

Thank you for your prayers, encouragement and help as he studied.

Debbie

News From The

IRS



IRS is investigating abuses and promises to take quick action against the involved taxpayers and their preparers. IRS Commissioner Mark W. Everson stated that "audit letters will be sent out soon and, when appropriate, [IRS] investigators will visit tax preparers who have been preparing questionable telephone tax refunds." A correct

refund claim will only be for the amount of the 3-percent tax imposed on long distance and bundled telephone services during the 41-month period from March 2003 to July 2006. In the alternative, a taxpayer may claim a refund in the standard amount set by the IRS, which ranges from \$30 to \$60, based on the number of exemptions claimed on the taxpayer's return.

(Have you seen the articles in the paper about this? Lots of news about the IRS raids on tax preparers involved in this fraud!)

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. Jan. 17, 2007**

Location: Novak's Hungarian Restaurant, Albany, OR

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

The minutes were presented in our newsletter. Correction made that the morning meetings will be held in February, March, and April not January, February, and March. Minutes approved as corrected.

The Treasurer's Report was presented and approved

Total checking \$4557.80

Total current assets \$10,384.94

There were 29 members present

Unfinished business:

Education: February and March OATC meetings will be held at Novak's in Albany. The subject will be moderated roundtable discussions for 2 hours of C.E.

Morning meetings: these will be held on the first Thursday at 7:00 a.m. in February, March, and April. There will be no C.E. credits for these meetings.

Safety Net: the first meeting will be in May in Albany. Speakers will be Tracey Gates and Trent Toler. Education will cover investments, especially Schedules B and D.

Convention: Ave reminds us that the convention is coming up in June, it will provide 20 hours of education. Education includes partnerships, and small business. It will include the same format as last year with one "problem" flowing through the four days of education. This year's convention will be in Seaside, OR.

There being no further business the meeting adjourned at 6:42 pm.

The education was presented by Robert Norton Jr. CPA LLC from Salem
Topic: IRS Update

Respectfully submitted,

Brandie Stucky - Secretary

News from the Oregon Department of Revenue

Oregon 2-d barcodes are now required on all software-produced paper Personal Income Tax Forms 40, 40S and Schedule WFC. The barcodes must be approved by the department. Other forms will be included as they become available. The permanent rule went into effect Jan 1, 2007 and affects forms and the schedule WFC for the tax year 2006 forward. (OAR 150-314.38(3))
www.oregon.gov/DOR/docs/IncomeR/314.385.3.pdf

- If your software allows you to turn off the printing of the barcode you must turn it back on.
- Make sure when making changes to return information that you reprint the entire return and submit the entire new reprinted return with changes. Handwritten changes will not reflect in the barcode and may be missed in processing.
- Send barcoded refund or no tax due returns to:

REFUND
PO Box 14710
Salem OR 97309-0460

- Mail 2-D barcode tax-to-pay returns to:

Oregon Department of Revenue
PO Box 14720
Salem OR 97309-0463

- Corporate tax returns - the addresses for mailing your 2-D barcode corporate tax returns are the same as the addresses for traditional returns.

Suzie McDonnell
Oregon Dept of Revenue
IPD Alternative Filing/2D
barcode Coordinator
Phone: 503-945-8444
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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

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