



Mid-Willamette Chapter

<http://oatc-oregon.org/Mid-Willamette>

Volume 5: Issue 3

March 2007

Meetings

March Meeting will be 3/21 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 March 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.

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Newsletter Contact

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

President's Corner *Message from the President*

March is here and can April be far behind? By the time you are reading this we will only have 5 weeks to go (except for extensions and late filers) So feel good you are almost half done with tax season, and if you can see over the pile of returns on your desk you will notice that our evening meeting is coming up fast. Come out to Novaks on the 21st for some education and bring your problem cases. Also bring your techniques on handling problems and where you go for answers so that we can all help each other.



Also look at your state newsletter for a registration form for convention.. If you have never gone this would be a good year to start. The location is good and the education should be fantastic. The convention committee is working very hard to provide the best ever convention come out and enjoy the fruits of their labor. Mark the dates June 13th thru June 16, 2007.

The tax board is looking for volunteers for consultant item writing committee members if you are interested contact monica walker at the tax board. Also please note that Duane Hunter is the new director after having served as field investigator for a number of years. Duane has in the past been a speaker at our meetings.

Don't forget the morning meeting, last for this year, will be April 5, 2007 at Novaks.

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.

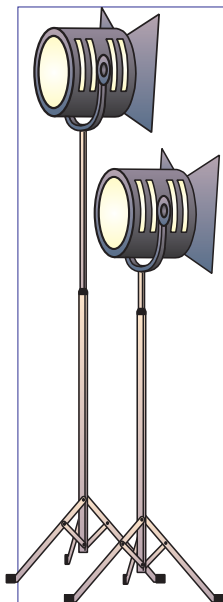
We will be having Safety Net in May - speakers will be Tracey Gates and Trent Toler. Education will cover investments, especially Schedules B and D. Safety Net will be held in Albany.



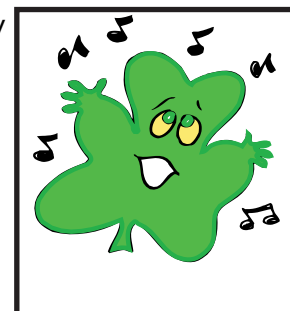
News From the Editor

Thank you to all of you who have signed up for the e-mail version of our newsletter! If you have not done so yet its never too late. Send me your email address. My e-mail address is: joanne@libertytax.com. If you would also like to pick up a hard copy I will print extras and bring them to the meetings...

Member Bio... Nancy Kelley



I was born in Hollywood, CA in 1946. We lived in many of the towns in the Los Angeles area, moving quite a bit so Mom could get better jobs. In 1961, we moved to Florence, Oregon from Monterey, CA and I really didn't think much of all the rain at all. But, now, after 46 years, I consider myself an Oregonian and wouldn't go back to California for anything.



I graduated from high school in Florence in 1964 and went to business college in Portland to study accounting. But, then I got married and had 2 kids so I never used my accounting at all for about 10 years. When my daughter started school, I got a job at Brudvig & Baker, CPAs and worked there for about 7 years. I was just the office person, typing, filing and assembling returns. Eventually I was doing corporate and partnership returns and some of the easier personal returns. In 1982, I got my preparer's license and joined OATC right away and I have served as a Trustee for several terms. But I never did enough personal returns to qualify to sit for the consultant's exam.

When I left the CPA office, I started doing some bookkeeping for a few firms and eventually it grew into a full-time thing. I now do books for about 20 firms and I also work part-time for an engineering firm which was my very first client. I have kept my preparer's license all this time but this year I am going to let it go. Bookkeeping is my first love and that is what I am going to spend my last six working years doing. It has been great getting to know all of you and even though I will no longer be a preparer, I may just show up at a meeting now and then to enjoy a visit and a good meal.

News From The **IRS**



This is a reminder to Electronic Return Originators that Form 8453, U.S. Individual Income Tax Declaration for an IRS e-file Return, mailed to the Internal Revenue Service should not include unnecessary attachments. Acceptable attachments to Tax Year 2006 Form 8453 include Form 1098-C, Form 3115, Form 3468, Form 4136, Form 5713, Form 8283, Form 8332, Form 8858, Form 8864, Form 8885 and Schedule D-1. Any documentation required by these forms should also be

attached. Please note that power of attorney guidance is included in Form 8453 instructions.

Do not send Forms W-2 to the I R S with Form 8453; keep them for your records.

An Authorized I R S e-file Provider must mail Form 8453 to the I R S within three business days after receiving acknowledgment that the return was accepted. An electronically transmitted return will not be considered complete until a Form 8453 signed by the taxpayer is received by the I R S. Form 8453 should not be submitted to the I R S when a return is accepted with a PIN signature.

Source: IRS e-file Quick Alert

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Did you know we know have a whistleblower office? This new office was established by the Tax Relief and Health Care Act of 2006. They are to handle information to uncover tax cheating by screening information and assigning cases to appropriate IRS offices for examination. Rewards of between 15 and 30 percent of amounts collected are to be paid out to informants. Rewards may be reduced if the IRS determines the whistleblower had anything to do with the planning or initiation of any action which lead to the underpayment of the tax. Source: CCH Essentials Tax Weekly, February 19, 2007

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. Feb. 21, 2007**

Location: Novak's Hungarian Restaurant, Albany, OR

The meeting was called to order by President Ave Giddings at 6:33 pm

The minutes were presented in our newsletter and approved as generated.

The Treasurer's Report was presented and approved

Total checking/savings \$1523

Total current assets \$10,335

There were 15 members present

Unfinished business:

Education: regular meeting will be in March at Novak's in Albany.

Morning meetings: first Thursday of the month at Novak's in Albany at 7:00am. There are no CE credits for these meetings. There are two remaining in March and April.

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: June 13 - 16 in Seaside, OR, including headstart. Registration form in state OATC newsletter.

There being no further business the meeting adjourned at 6:47 pm.

The education was a moderated round table discussion led by Kari Lasswell.

Respectfully submitted,

Brandie Stucky - Secretary

News from the Oregon Department of Revenue

Question: Can we e-file a return that does not have the employers state id number?

Answer:

Yes, it's permissible to e-file the return. The W2 must have the EIN; we won't reject a return for not having the employers State ID number.

Jeanie Davidson

Oregon Department of Revenue

Personal Tax and Compliance

E-File Hotline 503-945-8415

Fax 503-945-8649

E-Mail

electronic.filing@state.or.us

Friendly reminder: If you are required to file a 8453 instead of the 8879 for the federal signature you are required to have a signed Oregon EF form. It is not necessary to mail in the Oregon EF form but you must have it in your file.

OATC Tax Preparer

Scholarship Available – Do you know someone who wants to be a Tax Preparer, but may not have the necessary financial resources? There is a scholarship offered by the Oregon Association of Tax Consultants to help someone in financial need prepare for and take the state licensing test. For more information, call Carol Moore at the OATC office 503-261-0878.

Just for fun: Three men check into a motel for a night - the clerk tells them the cost is \$30 for the night and so each pays \$10. Later that evening the clerk realizes the cost of their room is \$25 not \$30 so he sends the bellhop to their room with their \$5 refund. The bellhop, not being a math wizard, could not figure out how to split \$5 equally between the 3 men so he gave each man \$1 and he kept \$2 for himself. So now each man has paid \$9 towards the cost of the room for a total of \$27 - and the bellhop has \$2 - that totals \$29 - where did the other \$1 go??? The first person to have the correct answer at this month's meeting wins a prize so come early if you have the answer! You can also email me your answer and I will give a prize to the first correct email answer also - but you will have to come to the meeting to get it! My email address is: joanne@libertytax.com



Mid-Willamette Valley Chapter
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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

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