



Mid-Willamette Chapter

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

March 2008

Meetings

March Meeting will be 3/19 in Albany- at Elmer's 2802 Santiam Hwy SE (By Albertson's)

Bring your questions for round table!

Our March Monthly meeting will be at Elmer'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.

MORNING MEETING REMINDER

Tuesday April 1st at Novaks 7 am.

Inside This Issue

Presidents Corner.....	1
Education	1
News from the Editor	1
News from IRS.....	2
News from IRS.....	2
News from ODR	2

Newsletter Contact

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

President's Corner *Message from the President*

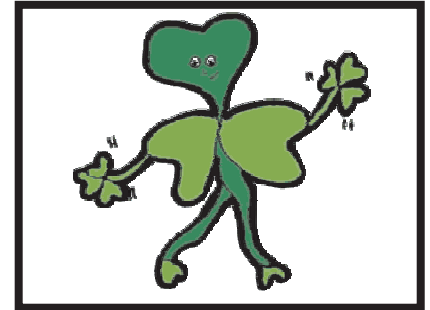
This letter is late getting to JoAnne so she will probably be late getting the newsletter out to everyone, and I apologize. I don't even have time to work up a good excuse--maybe next month-- nope I'll be dead by then-- okay dead tired. I would be complaining a lot louder if it wasn't busy so lets all be thankful that it is busy.

From the e-mail from IRS and ODR it sounds like this tax season is not to bad. Lets hope that it stays that way. Everyone should be on Brian Wozniak's mailing list-- no jokes, no cartoons, only concise information timely served, just what we all need during tax season. ODR's serve list is also very good try it if you are not receiving it.

On Friday February 29, 2008 I received an e-mail from Ron Wagner of ODR -- He ran the Tax Practitioner liaison meetings for ODR. That was to be his last day after 28 years (he must have started when he was 12). However we can all welcome him to The Oregon State Board of Tax Practitioners as the new Executive Director. If you have not met Ron hopefully we can get him to a meeting in the future so everyone can meet him, I think that you will like him.

Don't forget the next meeting the 19th of March at Elmer's. Also the last breakfast meeting coming up in April.

Ave

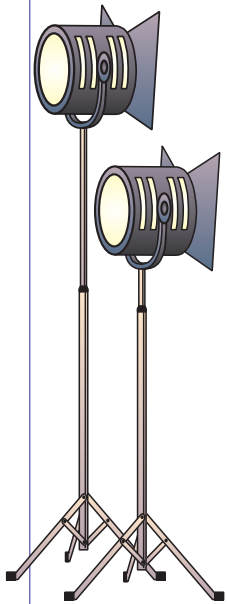


This month's education will be in Albany at Elmer's - Wednesday March 19th - and we will be having a structured round table so bring your tough questions. This will be good for 2 hours of CPE. We are also meeting in the morning (7am) on the FIRST TUESDAY of the month (that is April 1st) at Novak's in Albany for breakfast and group discussions - this is an informal meeting but we get lots of great information and although there are no CPE hours for this meeting there is lots of good information shared.

We will be meeting in Albany at Elmer's through April - and in May, June, July and August we will be back in Lebanon.

No April Meeting - No April Newsletter and the May Meeting will be in Lebanon at: Wing Ming's.

The address for Wing Ming's is 1170 South Main St, Lebanon and their phone number should you need it is 258-5889.



Older Than Dirt??? Beware!!!

You've all heard the expression "Older Than Dirt" but few of you see it up close and personal like Georgie Lowell! Looks like someone (I wonder who??) Is trying to send her a message.... As you can see Georgie (on the right) had a birthday visit from the Grim Reaper -- and from what I was told the expressions on the faces of the clients in the office - no one was sure what was going on -- I imagine they all thought the IRS was there to collect taxes due! Gives a whole new meaning to the current IRS ad campaign: "A New Friendlier, Gentler IRS" doesn't it!



News From Board of Tax Practitioners

It is that time of year again to recruit members for the Consultant Item Writing Committee.

Here is your opportunity to get involved in the examination development process. Examination item banks are reviewed annually by members of the Item Writing Committee. This years Item Writing Committee meetings for the development of the 2007 Tax Law Consultant examinations will be held on Thursday, April 17, 2008 and Friday April 18, 2008.

The Board would like to encourage all Licensed Tax Consultants to become part of the consultant examination development process. Recommendations made and new examination questions written by the Item Writing Committee will be reviewed and considered by the Board during their consultant examination work session which will be held in early May.

The criteria for becoming a consultant examination item writing committee member, is as follows:

- Must be a currently licensed and active Tax Consultant
- Shall be in good standing with the Board
- Must sign & agree with all examination confidentiality requirements(s).

If interested please respond by email no later than March 26, 2008: Monica.j.walker@state.or.us. Or Fax - (503) 378-3575 - The details regarding this and a registration form are on page 4 of this newsletter.

Thank you,
Oregon State Board of Tax Practitioners

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. 20, 2008**

Location: Elmer's Restaurant, Albany, OR

The meeting was called to order by President Ave Giddings at 6:36 pm

Minutes: Secretary, Brandie Stucky, read the minutes. The minutes were accepted as read.

Treasurer's Report

Total Checking/Savings: \$12,363.34

There were 17 members present.

Upcoming Chapter Education:

The March OATC meeting will be a Moderated Round Table discussion. This meeting will be held at Elmer's restaurant in Albany.

Morning meetings: February - April on the second Wednesday at 7:00 a.m. at Novak's Restaurant in Albany. These meetings are not good for any C.E. credits. The state tax board inquired as to why we are not offering credit for these meetings. The consensus is that the meetings are not structured or moderated and we don't want them to be, therefore we do not offer credit.

A motion was made to change the morning meetings to the first Tuesday of the month. The motion was seconded and approved.

Bill McKinney has requested that we look at a different night of the week for our monthly OATC meetings. It was decided that we will put this discussion off till the June OATC meeting.

Unfinished business:

Kari Lasswell purchased a projector for the OATC meetings. She suggested that we could rent it out as a way to recoup the cost. Bill McKinney moved that we would rent the projector. Jo Ann Vetter seconded the motion. The motion was approved. Kari Lasswell will be sure to write up a contract for any renters. The rental fee will be \$10 per use.

Group service's orders: Debbie McKinney received a 139 (A book with the state municipal percentages.) She did not order this. If you are the person who ordered it please contact her.

New Business:

Jo Ann Vetter noted that the postage stamps are again going to increase in price. She wants to know if she should buy several at the current price as "forever" stamps. Debbie McKinney moves that she buys a minimum of a one year supply. The motion was seconded by Kari Lasswell.

There being no further business the meeting adjourned at 6:58 pm.

The education was a moderated round table discussion let by: Kari Lasswell

Respectfully submitted,
Brandie Stucky - Secretary

News From The

IRS



FAQs Related to Tax Return Preparer Penalty Notices

If a taxpayer brings a tax organizer to an appointment with a tax return preparer and the organizer reflects that the taxpayer made certain dollar amount of charitable contributions, does a preparer need to see documentation of the payments?

A preparer may rely in good faith without verification upon information furnished by the taxpayer if it does not appear to be incorrect or incomplete, but may not ignore the implications of information furnished to the tax return preparer or actually known to the tax return preparer.

The preparer, however, needs to inquire about the existence of documentation in accordance with the appropriate reporting and substantiation requirements

SPECIAL EXAMINATION REQUEST
ITEM WRITING COMMITTEE CONSULTANT EXAMINATION

The Board of Tax Practitioners is seeking dedicated instructors/licenses interested in becoming item writing committee members for the review of the Tax Board's consultant examination item bank.

The Board is looking to expand the yearly review/update of the consultant examination and is seeking a pool of approx. 15 to 20 persons wishing to serve on a consultant examination item writing committee. The Board would like to invite individuals to attend a two-day item writing committee consultant examination session to review the consultant examination item bank, update examination questions to current tax law, reference source documents for accuracy, write new examination questions and provide recommendations on the consultant examination.

The consultant examination item writing committee review sessions will be held on **Thursday, April 17, 2008 and Friday, April 18, 2008**. Attendance at the item writing committee meetings will be voluntary. Continuing education credit for the hours spent working with the item writing committee and a working lunch will be provided by the Board.

If interested, please respond to this e-mail by: March 26, 2008. The Board would like to recruit at least one representative from each basic course sponsor.

The criteria for becoming a consultant examination item writing committee member, is as follows:

- Must be a currently licensed and active Tax Consultant.
- Shall be in good standing with the Board.
- Must sign & agree with all examination confidentiality requirement(s).

All requests submitted will be reviewed to verify the above qualifications. Please note: Due to space limitations, if an excess of requests are received, not all applicants will be notified to serve on the committee. If this occurs, excess applicants will be placed on a substitution list for the committee and/or recruited to serve as a test-taker for the development of the consultant examination.

For questions please contact me by phone at (503) 378-4034 or by e-mail at monica.j.walker@state.or.us

Sincerely,

Monica J. Walker, Examination & Education Coordinator
Board of Tax Practitioners
Phone: (503) 378-4034 / Fax: (503) 378-3575

If interested, please complete the registration form below & return no later than: March 26, 2008

Submit form via: E-mail – monica.j.walker@state.or.us OR Fax – (503) 378-3575

ITEM WRITING COMMITTEE REGISTRATION FORM - CONSULTANT EXAMINATION

PRINTED NAME: _____ LICENSE #: _____

DAYTIME PHONE: _(____)_____ EMAIL ADDRESS: _____

MAILING ADDRESS: _____ City: _____ State: _____ Zipcode: _____

I WOULD LIKE TO ATTEND AND PARTICIPATE IN THE APRIL 17 & 18, 2008, ITEM WRITING COMMITTEE MEETINGS.



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	Susan High 503-655-3737	Ave Giddings 541-926-7382
<i>1st VP:</i>	John Bell 503-626-3342	Janice Wyss 503-762-1432	Sharon Starr 541-258-3582
<i>2nd VP:</i>		Beverley Diercks 503-394-3510	Kari Lasswell 541760-0124
<i>3rd VP:</i>		Eric Arnoldus 541-963-8304	
<i>Secretary:</i>	Barbara Culver 253-859-8567	Cheryl Brown 541-975-1850	Brandie Stucky 541-541-8299
<i>Treasurer:</i>	Michael Graves 360-588-8077	Laurie Mills 503-928-3101	Tom Dundas 541-258-5600
<i>Board Members:</i>			Linda Harding Bill McKinney Dennis Secrest
<i>Past President:</i>	Linda Mussen 503-292-6252	Denny Purkey 503-620-3061	Cynthia Clark 541-466-3144