



# Mid-Willamette Valley Chapter

Volume 4: Issue 6

July 2006

## Upcoming Events

- Monthly Meeting - 7/19  
at Bings Restaurant in Lebanon
- Monthly Meeting - 8/16  
at Bings Restaurant in Lebanon
- Back to Basics - Sep 2006
- OR Dept of Revenue  
Liaison Meeting - 7/28

Our Monthly meeting will be at **Bings Restaurant** in Lebanon. 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

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*

Thanks to the membership. I want to thank you for putting your trust in me to be your president. But more importantly I want to thank you for providing me with a wonderful slate of officers to work with. Jo Anne Vetter of Liberty Tax has volunteered to be our Newsletter Editor, so at this time we have a full slate of officers for the coming 2 years. Currently all of the officers and newsletter editor are scheduled to attend Chapter Officers Training put on by OATC, July 14 & 15, in Milwaukee. This training helps our local officers understand what is expected of them and where they can go for assistance if needed. This training will allow all of your newly elected officers to provide you with top flight service.



Please don't forget to say thank you to all of last years officers. They provided me with a fully functioning chapter that only needs to be maintained! Cindy Clark our past president leaves some big shoes to fill. Robin Machado our 2nd vice president provided the chapter with excellent education each month for the past two years in addition to doing group services one year and working on the convention education committee last year, a very full plate. Leah Stewart came in mid-term to take over as treasurer and so many other projects that I get tired just thinking of all she has done for the chapter. Mandy Jansen was our secretary and our newsletter editor. These are two extremely important functions that seldom get the appreciation that they deserve. We all see the newsletter -- what we don't see are all the phone calls asking for material for the newsletter, and the last second changes that are sometimes needed. For all of the above I ask every member to take the time to thank all of last years officers for all they have done for your chapter. This is the only pay they will get so lets pay them well!

As we go through this year I will try to have each of our officers write a "Get To Know Them" article for our newsletter, so you can get to know them better. I would also ask that each and every member please contact any officer with any ideas you have on how to make things better. With your help we can have fun, learn more about taxes, and improve our businesses.

Thank you again.

Ave

## Convention - Bev Diercks

The convention was held at the Red Lion in Pendleton on June 21 - 24. Those of us involved in conventions, education committee and executive council attended meetings on Tuesday. We were entertained that night either by a trip to the Bar M Ranch with a fine BBQ dinner and some great western music, or a trip to the Tamastlikt Cultural Institute for a guided tour of the museum to learn more about the native Indian tribes.

Our convention theme was *SELLING THE RANCH*. Wednesday was our Head Start Education with 5 hours of basis presented by Jayne Williams. The 6th hour of the day was a presentation on Identity theft given by Brian Wozniak from Internal Revenue Service. He is a great speaker and if you ever get a chance to hear him, I highly recommend it. Wednesday night many of us took the Underground Tour. The tour lasts about 1-1/2 hours and is very interesting.

Thursday we started our day with Toija Beutler giving us lots of tips on what we need to be aware of as we forge ahead with our clients in a like kind exchange. Jayne Williams took all the ranch business property and provided the information to make the like kind exchange for rentals. In the afternoon



Bob Norton addressed the sale of the real property held for personal use and Joni Rio discussed some very interesting rental issues for the modern day world. After dinner we played bingo and pinochle. It got pretty wild with our bingo hosts I am told.

Friday morning we were treated to some good old-fashioned common sense management skills from our president, Denny Purkey. Joni Rio sold off all of the personal property ranch assets. Mike Purkey, a new speaker to many of us, gave us a lot of good information on gifting. Our evening was filled with our banquet and awards. Our own Leah Steward received a beautiful award for all the work she has done for Group Services.

Saturday brought us to the close of Convention with a lot of good advice on retirement and estate planning from Steve Cyr.

Some of us stayed an extra day to play. Let me tell you that convention is much more than education. It is an opportunity to meet new people and renew friendships made in prior years. I can tell you that Robin and I worked hard at the convention, along with many others, but what I get out of meeting all of the wonderful people at Convention is way more than the work I put in. If you weren't there you missed a great time.

## News From The IRS

from IRS e-News Special Issue, Fri, 07 Jul 2006

IRS Stakeholder Liaison is offering a series of seven FREE phone forums from July 18th through Sep 7th.

These FREE forums are open to all practitioners.



July 18 & Aug 14th, 1 pm - 2:45 pm (Pacific):

E-services Overview, Registration, Delegation and Electronic e-file Application. Up to 2 hours CPE available.

Access Code for July 18: 143147

Access Code for Aug 14: 766184

July 25 & Aug 21, 7am - 9:30 am (Pacific)

E-services Premium Products: How to use Disclosure Authorization, Transcript Delivery System and Electronic Account Resolution. Up to 3 hours CPE available. Access Code for July 25: 689537

Access Code for Aug 21: 478194

Aug 10, 5 am - 6 am (Pacific): IRS Products and Services available for Tax Practitioners with Spanish-Speaking Clients. Access Code: 831148

Aug 29, 5 am - 6 am (Pacific): Appealing IRS Collection Actions - An Explanation of Collection Due Process and the Collection Appeals Program. 1 hour

CPE available. Access Code: 558149

Sep 7, 11 am - 12 pm (Pacific): Practitioners and IRS Oversight: Learn How IRS Preparer Coordinators, TIGTA and OPR Coordinate Policies Regarding Practitioner Conduct. Access Code: 542337

Attend one or all forums by registering for each forum separately at: ATT TeleConference Services:

<https://www.attevent.com/rsvpreg.asp>

Register for each forum separately using the applicable access codes. You will receive a confirmation e-mail assigning a separate Personal Identification Number (PIN) for each forum as well as the call-in phone number. If you have not previously attended an event though AT&T you will need to create a profile first. Include whether you are an attorney, CPA, EA or unenrolled preparer in the profile "Company" field.

Participant information:

- Please dial in 3-5 minutes prior to the conference start time.
- Enter the access code, followed by the # sign
- Enter your PIN followed by the # sign
- Your line will be placed on hold with music until the forum starts.

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## News from *The Board of Tax Practitioners*

June 2006 Vol 30, Issue 1 Tax Board Bulletin - Message from the Board Chair - Merry Van Atta

### **TECHNOLOGY CE**

Did you know that courses on how to protect your data from hackers and viruses, or a course on how to back up your data or how to evaluate electronic file cabinet systems do not qualify for CE?

Our profession is moving into new territory with paperless offices and mandatory e-filing, yes as the rules now stand, unless a licensee can demonstrate a *direct* relationship to the preparation of a client's income tax return, instruction in the area of technology does **not** qualify as continuing education.

You, the licensee, can change this according to Merry VanAtta, Board Chair. In her article she states that the current Board will not act on changing this unless they hear from us, the licensees. She states that we can direct the Board to include Technology as a general subject matter for acceptable continuing education by simply telling them it is time to acknowledge that as professionals we need that expertise. Conversely, if you think this is an area that

### **Serve List Update**

The State Board office is currently using an e-mail serve list to update licensees with current events information or items that may affect industry practices. If you have not yet provided your e-mail address to the state board you need to do it now. To register your e-mail address go the forms page of the boards website: <http://egove.oregon.gov/OTPB/FORMS.shtml> and download the Address Change form, then mail or fax the completed form to the board office.

If you do not have e-mail please contact the board office at 503-378-4034 or mail at 3218 SE Pringle Road #120, Salem OR 97302 so they can update your record.

This months education will be presented by *Sofia Parra*, from OR Dept of Revenue and will be on **"Oregon Tax Credits & other Information"** Sofia plans to cover the following topics:

- Severely Disabled & Disabled Child
- IDA Contributions, donations, & withdrawals
- Reforestation
- Riparian Land
- Residential Energy Credits
- Additional Information

This should be very informative. Bring your questions for the speaker.

**Next month:** Bill Mc Kinney will be covering the "Fundamentals of Stock Cost Basis"



should remain unacceptable for CE, you need to tell that too.

The Board has asked for our input in the past and there has been little response. Merry is asking that we SHOUT to the Board this time. A simple e-mail, or letter will do. It doesn't have to be long or detailed, just a simple YES I think Technology courses should be acceptable CE or NO I don't think Technology courses should be acceptable CE.

According to Merry's article when hundreds of us respond the Board will listen. The board will be addressing Technology courses at their September 13, 2006 board meeting. She asks that we please respond as soon as possible. Let your voice be heard. You can e-mail the board at [tax.bd@state.or.us](mailto:tax.bd@state.or.us) or US Mail your response to: 3218 Pringle Rd SE #120, Salem OR 97302. Merry ends her article with a reminder that this will "only take two minutes of your time. JUST DO IT"

## **IT'S A PROCESS!**

### **The Processing Tour at the Oregon Department of Revenue**

The June 30th Tax Practitioner Liaison Meeting at the Oregon Department of Revenue ended with a "Processing Tour." Conducted by Revenue employees who were candid in answering our questions, we were privy to a clearer understanding the about the whole process of how things do and don't get done with State tax returns.

As you would expect, original tax returns that are e-filed can be processed rather quickly. Mailed-in amended tax returns take months to process. There are currently about 24,000 of those in the "in box." Over 64,000 Oregon tax returns for the 2005 tax year are also still in "suspense" - which means they are incomplete for a variety of reasons, including awaiting replies from written requests to taxpayers.

Things to be aware of for the next tax season, according to the Department of Revenue, included an increase in transit withholding tax from both Multnomah and Lane counties. The next Liaison meeting will be Friday, July 28th from 9 to 11 am in the Fishbowl meeting room at the Revenue building. To be added to an email notification list, contact the meeting facilitator, Ron Wagner:

[ronald.a.wagner@state.or.us](mailto:ronald.a.wagner@state.or.us)

## **News From The IRS**

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Space is limited so please register early. Handouts will be e-mailed to you prior to the event. If you have questions email: [StakeholderEducation@irs.gov](mailto:StakeholderEducation@irs.gov) specify the topic and date in the subject line, or call Marc Zine at (916) 974-5281.



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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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<i>2nd VP:</i>		Neil Gibson 503-232-9050	Kari Lasswell 541760-0124
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<i>Board Members:</i>			Linda Harding Bill McKinney Nancy Kelley
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