



# Mid-Willamette Chapter

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

July 2008

## Meetings

July Meeting will be Wednesday 7/16 in Lebanon at Wing Ming's.

The address is 1170 South Main St. and their phone number, should you need it, is 258-5889

*No-Host dinner beginning at 5:45. Business meeting at 6:30. Education will begin at 7:00.*

## News From the Editor

*I am still using US Mail for over half of the newsletters I send out at considerable cost to the chapter. PLEASE provide us with your email address and help us in our effort to save the high cost of postage.*

*Thank you  
Jo Anne Vetter*

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### Newsletter Contact

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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*

Hello Fellow Practitioners, This has been a very busy month for many of us. I've been working a lot on taxes, studying and researching current activities, pending law changes, etc. I have been at the O.A.T.C. Convention and received over 20 hours of Very Good education. I enjoyed the company, fellowship, networking, and a truly great time. Convention is really a wonderful opportunity to grow in many ways.



Talking about Convention; this next year we will be going back up to Hood River and let me tell you, the facility and the total environment is wonderful. We were up there a few years back and had an absolute blast. If you've never been to Convention, or if you've not gone in a while, perhaps this coming year you ought to consider giving it a try. I think it would be awesome if all of our members, I'm talking about the entire Mid-Willamette Chapter could make it, and ALL of us could experience this together. It builds team spirit and helps solidify friendships, old and new.

Debbie, Jo Anne, Bev, and I just returned from Officer training. There are a lot of things coming down the pike. You'll want to be watching your email and your postal mailbox. Also visit the website for our chapter, for the State, and NATC's. We are expecting a VERY important ballot issue to be placed before us as O.A.T.C. / N.A.T.C. members soon. You will also want to be at the next several chapter meetings, as our Chapter is also considering several

My goals as your New President are fairly high reaching. I want to help our  
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This month's education will be in Lebanon at Wing Ming's - Wednesday July 16th - and will be presented by Bill McKinney. This is an updated presentation covering the AMT from a 40,000 foot view. There will be more details, more facts, more lines on the 6251 covered in this presentation. Come join us, bring your experiences and solutions to this very complex topic. You will received 2 hours of CPE - FREE if you are a member of OATC.

*Message from the President Continued from page 1*

Chapter grow in population and quality. I also want to do everything in my power to build each of us up, to be an encourager, and a support. You can always feel free to call me and share, ask for help, or point out a need or problem. I've heard it said "You miss 100% of the baskets, if you fail to take the shot". Well I want to be in the game, and I want you to play on the team too. We can make O.A.T.C. - Mid Willamette an excellent place - together.

I hope your Summer has been good to you so far, and continues to be so. I want to do a **Board Meeting / Potluck** at our house in Lebanon, **July 26th, 4PM**. Debbie and I will provide the hamburgers and hotdogs and the Grill. To make this a success, I do need a call ahead of time from everyone who would like to join in. **Board Members** please RSVP by the **19th** as this will also be our first scheduled Board Meeting with our new staff and we need a Quorum. I also need an RSVP from any other members no later than the **23rd** - if you are planning on joining us. Call our Home number at 541-259-4570, or send us an email at [thetaxprofessors@hotmail.com](mailto:thetaxprofessors@hotmail.com).

We'll see you at the next meeting in Lebanon.

Until then, Take Care and Stay well.

## Bill

William McKinney E.A., L.T.C.  
President

## News From The IRS



The IRS has issued temporary and proposed regulations that will reduce the extension of time to file certain business tax returns from six months to five. Requiring these statements to be issued one month earlier, generally by Sept. 15, will provide recipients time to prepare and file returns within the extended time frames.

This change will be effective for extension requests for tax returns due on or after Jan. 1, 2009, and applies to business entities that file the following returns and forms that have a tax year ending on or after Sept. 30, 2008:

Form 1065, U.S. Return of Partnership Income

Form 1041, U.S. Income Tax Return for Estates & Trusts

Form 8804, Annual Return for Partnership Withholding Tax (Section 1446)

IR-2008-84 provides an overview of the new regulations.

**The IRS is seeking public comment on this new regulation – please follow the instructions contained in REG-115457-08 at <http://www.regulations.gov> if you want to provide feedback.**

If that is not enough, Treasury Decision (TD 9407-2) contains much more extensive detail.

Thank you,

Brian Wozniak

IRS SB/SE CLD

*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.*

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**Mid-Willamette Chapter  
Oregon Association of Tax Consultants  
General Business Meeting  
Wed. May 21, 2008**

**Location:** Wing Ming's Restaurant, Lebanon, OR

The meeting was called to order by President Ave Giddings at 6:35 pm

**Minutes:** The minutes were in the newsletter and accepted without corrections.

**Treasurer's Report**

Total checking/savings: \$10,356.04

Special Note: "Forever" stamps were purchased and will be included in prepaid expenses.

There were 16 members present, including the OATC President, Susan High and the OATC 3<sup>rd</sup> V.P., Eric Arnoldus

**Education:**

**Chapter Education**

The June and July meetings will be held at Wing Ming's in Lebanon. The meetings for the rest of the year will be in Albany.

**Convention Report:**

Beverly Diercks went over the education that will be at the convention. There is a total of 22 hours. Also, some fun side trips and activities are available. She brought extra copies of the registration for anyone who was interested. President, Ave Giddings, also shared the benefits and fun to be had by attending. Auction gifts are welcome to help raise money for the building fund. Also, small gifts may be donated for the bingo game.

**Super Star Seminar:**

Beverly Diercks shared her brochure on this two day seminar. October 29 & 30 at the Holiday Inn in Wilsonville.

**Unfinished business:**

Safety Net: Beverly Diercks attended and gave a brief report.

**New Business:**

Nominating Committee had the following nominees:

President - Bill McKinney

First Vice President - Tena Fitzmorris

Second Vice President - Kari Laswell

Secretary - Brandie Stucky

Treasurer - Tom Dundas

Board Member (1) - Sharon Starr

Board Member (2) - JoAnne Vetter

No other nominations were brought from the floor. Beverly Diercks moved that we elect all nominees by a unanimous vote. The movement was seconded by Tom Dundas and Tena Fitzmorris. All nominees were elected by a unanimous vote without any opposition.

**Officer Training:**

July 11 & 12 in Milwaukie, OR. Please register if you plan to attend Eric Arnoldus will email the registration to the Chapter Presidents for distribution.

There being no further business, Ave adjourned the meeting at 7:04 pm.

The education was on Military Issues and presented by Eric Arnoldus

Respectfully submitted,

Brandie Stucky, Secretary

## Tour de Revenue

### An Insider View of Processing Tax Returns at Oregon's Department of Revenue

Tax Practitioners attending the June 20<sup>th</sup> Liaison meeting at the Oregon Department of Revenue were escorted through a private tour of the Processing Center. Conducted by Revenue employees who were candid in answering our questions, we were privy to an insider view of what speeds things up and what hangs them up. We also witnessed testing of the Department's new document scanning equipment which will hopefully be perfected for processing tax returns this coming filing season.

Dee Brinlee, on temporary assignment to the Policy & Systems unit of the Department of Revenue, facilitated the Tax Practitioner meeting, held a week earlier than the usual 4<sup>th</sup> Friday of each off-season month. The earlier date was to accommodate OATC's annual convention, at which Dee was appearing. Unless otherwise notified, the next meeting of the Liaison group will be Friday, July 25<sup>th</sup> from 9 until 11 am in the Fishbowl Meeting Room at the Revenue building in Salem.

Processing center news shared at the meeting by Sharon Johnston was that 1.7 million individual tax returns were processed the first six months of this year. The Department is keeping pace with original returns still being submitted, other than the 66,000 returns still in the Suspense unit (as of June 13<sup>th</sup>). They are still working on amended returns, some of them dating back to January. Even "State Only" electronically submitted amended returns are not processed until the original returns have worked their way through the Suspense unit.

Ron Wagner (formerly with the DOR), now serving as Executive Director of the State Board of Tax Practitioners, updated the group on staffing for the tax board, and upcoming events. Notably, the summer board meeting is scheduled for Thursday, July 10<sup>th</sup> at the Morrow Crane Building's upstairs conference room. (3218 Pringle Rd SE, Salem OR 97302) Open to the public (current licensees are encouraged to attend), the packed agenda begins at 9:00 am and adjourns at 4:30 pm.

Brian Wozniak, our IRS representative, also spoke to the group at 10:40 am (how did he manage that "1040" time slot?). He addressed the issue that "payment due" notices are sometimes generated by the IRS shortly after the end of the filing season, even though the taxpayers have sent in timely payments close to the filing deadline. That's because payments are sometimes not actually posted to taxpayer accounts for up to 3 to 4 weeks after the funds are received. An interesting footnote to this conversation was that the IRS not only scans the contents of envelopes (including checks), but also the envelope itself to show the postmark!

Brian also spoke of planned modernization for tax filing. Beginning in 2009, the IRS hopes to be able to accept some PDF-platform attachments to electronically submitted tax returns. Also, perhaps as early as August of this year, e-services may become available for individual taxpayers to view transcripts of their own returns. We'll try to keep you posted on these developments, as well as emerging regulations on preparer penalties.

## Message from Membership Chair

Bill, Jo Anne, Bev and I just returned from Officers' Training. What a very interesting and informative time we had. Bev, as your 2nd VP for the State OATC was very active in helping put the training session on, and she taught the session for Vice Presidents.

Bill was there representing your chapter as the President. Joanne was there as the teacher for the Newsletter Editors, and I was there as the Chair for the State Membership Committee, and facilitated the Committee meeting.

You should be very proud to have your Chapter so well represented among your peers!

As your Membership Chair, I'd like to share some exciting plans for OATC. For the last few years the Membership Committee has not been very active, and as a result membership in many chapters has been declining. I'm here to tell you that we now have an active, working Committee committed to helping you make OATC a strong, vibrant, growing organization. We can't do this alone, however. It takes teamwork: the Committee and YOU!

You may ask "Why should I help? What will it benefit me to help OATC grow?" The more members we have, the more dues the organization receives, which means more budget to help provide benefits to all members, which would be YOU! And we are always asking for volunteers. The more members, the more volunteers to spread the work among, which means we can reap the benefits of more work, with less individual effort.

There is also one more reason you should help encourage new members: As Eric Arnoldus put it, we should live "The Golden Rule, to do unto others as we would have them do unto us"! Do you appreciate OATC? Is the Education helping you and your business? Then share the wealth and invite someone new to join you at the next meeting! Besides being a good guy and helping someone else find the benefits of OATC, you will receive a \$10 scrip good towards OATC sponsored education, or even Group Services purchases!

Let's set the pace for the Statewide organization. How about we commit to doubling our chapter size this year?! Wouldn't that be awesome!? It only takes each one of us asking someone to join us at the next meeting. Will you take on the challenge?

*Debra McKinney, L.T.C.  
Membership Committee Chair--State*

### \*\*\*\* IMPORTANT NOTICE \*\*\*\*

**At the last two chapter meetings there was discussion on moving the meeting dates from the 3rd Wednesday of the month - several members have scheduling conflicts. After lengthy discussion it was suggested that the members of our chapter be asked to vote on this issue - either by email or phone to Bill McKinney, or at the next meeting. The days that are under consideration are the 2nd Tuesday of the month or the 3rd Thursday of the month. Please give this some thought and let Bill know which option is best for you. Bill's email address is: [mckinneybilltaxconsultant@hotmail.com](mailto:mckinneybilltaxconsultant@hotmail.com) Or you can contact him on his home number: 541-259-4570 or his cell number: 541-990-6088**



### Enquiring Minds Want to Know????

FYI -- For all of you at convention who heard that Bev had been looking for her *favorite* pair of red undies - we have it on good authority that all is well - they have been found!



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	William McKinney 541-990-6088
<i>1st VP:</i>	John Bell 503-626-3342	Janice Wyss 503-762-1432	Tena Fitzmorris 541-971-1522
<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>			Dennis Secrest Sharon Starr Jo Anne Vetter
<i>Past President:</i>	Linda Mussen 503-292-6252	Denny Purkey 503-620-3061	Ave Giddings 541-619-2614