



Mid-Willamette Chapter

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

Volume 8: Issue 4

June 2007

Meetings

August Meeting will be 8/15 in Lebanon - at Bing's 2416 Santiam Hwy

Next months meeting will be in Corvallis on September 19 - the location is yet to be announced.

Our August Monthly meeting will be at Bing's 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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Deadline: Please submit information by the first week of the month

President's Corner *Message from the President*

It's August and time for all good Licensed Tax Preparers to start preparing for renewing their license's. This must be completed by October 15, 2007. If you are short of continuing education hours there is time to correct it now. Basics and beyond seminars start in Baker City on September 22 and end September 29 at metro East (MT Hood CC), the closest is in Eugene on September 28. Now is the time to get



registered for this seminar cost is \$25.00 and gives 6 hours of cpe. Our chapter meeting have two hours of cpe at each meeting. The Oregon Dept of Revenue Tax Practitioner meetings on the 4th Friday of each month will provide 2 hrs of cpe plus some great education value, the next two are 08-24-2007 and 09-28-2007 at 955 center St , Salem. Also our Chapter will be sponsoring a 6 hour seminar prior to your renewal time. That is 20 hours of approved education between now and October 15,2007. The important thing is to start now if you wait until October 1st you could be in trouble.

Stacy Weeks the ODR Personal Income Tax Coordinator is leaving that position effective 08-06-2007 and will be replaced by Mark Ruth. She will be missed but I think that Mark Ruth will do a good job and Stacey will be there to help him get started. Stacey will still be at ODR as she is changing jobs for a better work schedule to assist her in the adoption of a teenager. Way to go MOM. Thanks to Ed Dart I can pass on the bad news that Gisela Zerkel fell and broke her hip and should be home by now. Lets keep her in our minds and give any assistance we can.

Also should you know someone that would like to take the basic tax course but cannot afford to pay for it, OATC has a Tax Preparer Scholarship. Contact the OATC office at 503-955-0878.

Also everyone who does any s corp returns should be getting prepared to attend the super star seminar on October 26 & 27 ,2007. Mark Pierce with the IRS will be the instructor, he is considered to be the most knowledgeable on s corps of anybody at IRS. It will be held at the Monarch Hotel at Clackamas Town Center.

Ave



This month's education will be in Lebanon at Bing's. Education will be Kay Dee Cole from the Corvallis Edward Jones office speaking on Oregon 529 plans and other financial planning issues.

Kari is looking for a suitable meeting location in Corvallis for the months of Sept - Dec. let her know if you have any ideas.

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. August 16, 2006

Location: Bing's Restaurant, Lebanon, OR

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

The minutes were present in our newsletter, no corrections, approved.

The Treasurer's Report was presented and approved

Total checking and savings 8823.42

Script on hand \$1479.65

There were 17 members and 1 guest present

Unfinished business: Fall Seminar: If you'd like to go to the seminar please send your check into Tom Dundas so that we can use our script. The seminar will be held Saturday, September 30 at Allied Waste in Albany from 9am - 4pm. Education presented by Judi Krussow.

Education: Corvallis location will be in the conference room at Salbasgeon Suites (behind cinema on 9th street). We will be able to order food off the menu. Our September speaker will be Judi Lasswell, topic from the IRS symposium.

OATC: vote by proxy for NATC for the IRS symposium in Las Vegas. You should have received this proxy vote in the mail. If you did not, Ave has copies that you may fill out.

New business:

None

There being no further business the meeting adjourned at 6:44 pm.

The education was presented by Bill McKinney.

Respectfully submitted,
Brandie Stucky - Secretary

News From The

IRS



Tax Calendar for Small Businesses
on IRS.gov

Are you running a small business? Would you like a calendar packed with valuable business tax information? The IRS is offering a free calendar to help you keep track of tax deadlines and important dates throughout the year.

You might be surprised to learn that the IRS publishes a calendar, but like our popular Web site, IRS.gov, the calendar is part of our many services to help owners and operators of small businesses.

The Tax Calendar for Small Businesses and Self-Employed Individuals from the Internal Revenue Service is a 12-month calendar is filled with deadline reminders, important information such as changes in deductible mileage rates and business tips such as how to organize business and travel expenses.

This widely-used special business tax calendar provides the small business owner with a ready resource for meeting his or her tax obligations.

Each page of the calendar highlights different tax issues and tips such as business planning, accounting methods, tracking your records, and protecting your information that are especially relevant to small-business owners. The calendar has room each month to add notes, state tax dates or business appointments.

Topics include information on

general business taxes, IRS and Social Security Administration customer assistance, electronic filing and paying options, retirement plans, business publications and forms, common tax filing dates, federal

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News for ODR

If you haven't checked out the ODR website lately do it now. They have added a "Licensee Look-up" feature. You can search by Name, License Number, address, or city by preparer or consultant or business. I have tried it and found it to be very user friendly. The link is located on the left, under the photo of Crater Lake.

News From the Editor



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

If you have anything you would like to have published in the newsletter please email it to me -- if it is of interest to you it most likely will be of interest to the rest of the membership.

My e-mail address is:

joanne@libertytax.com.

OATC***LARRY SCHEER, A MAN OF FIRSTS***

Larry Scheer passed away August 6, 2007. He was a man of firsts. He was the first President (and the 6th) of the Oregon Association of Tax Consultants. He was the first chair of the Board of Tax Practitioners (then called the State Board of Tax Service Examiners). He had been awarded the Margaret Sills award and the first (and only) to receive a Life Time Achievement Award, which was given in Hood River convention in 2005.

Larry Scheer was a member of a small core of Tax Practitioners who put Oregon's Licensing law together and helped it through the state legislature. He was a strong business man of vision who helped us in the formative years, to be the Association we are today.

Larry suffered a stroke six years ago, from which he never recovered. His wife Gayle cared for him in

FROM THE OATC OFFICE ADMINISTRATOR

1. 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.

News From The
IRS



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holidays and much more.

The 2007 Tax Calendar for Small Businesses, IRS Publication 1518, is now available in both English and Spanish versions. For an online version of the calendar, visit the Small Business Self-Employed pages on the IRS Web site at IRS.gov. Printed copies of the tax calendar can also be ordered online or by calling (800) 829-3676.

Links:

* Small Business and Self-Employed One-Stop Resource

*
Small Business Products Online Ordering

Revised Innocent Spouse Form Now Available

WASHINGTON ? The Internal Revenue Service today announced a redesigned Form 8857, Request for Innocent Spouse Relief, that will help reduce follow up

questions and reduce the burden on taxpayers.

The form will ask more questions initially, but collecting critical information early in the process will mean faster processing of the request. The new design will eliminate an estimated 30,000 follow-up letters annually. The result will be a reduced burden and quicker answer for taxpayers and less cost for the government.

The form was revised based on suggestions from an IRS process improvement team led by the Office of Taxpayer Burden Reduction.

When a taxpayer files a joint return, both spouses are jointly and individually responsible for the tax. Innocent Spouse relief provides an opportunity for a spouse to be relieved from the joint debt under certain circumstances. If one taxpayer believes that only his or her spouse or former spouse who should be responsible for the tax, the taxpayer can request relief from the tax liability.

The redesigned form also will be easier to understand and to complete and will help educate taxpayers about the process. Previously, the questionnaire was separate from the form. A line-by-line analysis also resulted in a reduction in the number of questions asked of taxpayers.

See Tax Information for Innocent Spouses on the IRS Web site for more



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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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