



Mid-Willamette Chapter

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

Volume 8: Issue 6

October 2007

Meetings

October Meeting will be 10/17 in Corvallis - at **Tommy's 4th Street Bar and Grill** (downstairs) 350 SW 4th St Corvallis

September, October and Novembers meetings will be in Corvallis!

Our October Monthly meeting will be in Corvallis at **Tommy's 4th Street Bar and Grill**. Come early for a no-host dinner beginning at 5:45. Business meeting will follow at 6:30. Education will begin at 7:00.

Inside This Issue

Presidents Corner.....	1
Education	2
Speaker Bio	2
Budget	3
News from the Editor	2
General Business	
Meeting Minutes	3
News from IRS.....	2
News from ODR	3
Military Issues Workshop....	4
Supply Order Forms	5

Newsletter Contact

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

President's Corner *Message from the President*

IMPORTANT NEWSLETTER TAX SEASON IS COMING PLEASE READ ALL!!!!

Tax Season is coming group services orders must be sent or delivered to Tom Dundas by October 15, 2007. The order form is in this newsletter, please fill it out **NOW** and send in to Tom. The State office just sent them to us so we couldn't send them to you any earlier. But Tom must compile them and send the order to OATC by the 15th. As you can see this does not give Tom any time. He will compile everything after his mail comes on the 15th and send it to OATC - if you order is not there by then it will not be included. Please do not be late!



Also included in this newsletter is information on a 6 hour seminar being put on jointly by our chapter and Salem chapter. This is a designed to increase membership in our chapters. The cost to members is \$20.00 and includes lunch. The cost to non-members is \$115.00 and includes 6 hours CPS, membership in OATC and lunch (new membership costs \$115.00). If you know anybody who is not yet a member talk to them about this opportunity to become a member, get 6 hours of CPE and lunch for only \$115.00. A used car salesman couldn't offer a better deal than this. Also don't forget that if you sponsor a new member you will get \$10.00 of script usable on OATC education and in the new member will also get \$10.00 script for OATC education. This deal just gets better and better! Please plan on going to this seminar and bringing a friend, associate, competitor, or any other licensee who would like a great deal on becoming a new member. Many of us have heard Eric give a 2 hour talk and some of us have heard his 4 hour seminar both of which ran out of time. Now you can get all of the information available in a 6 hour format--don't miss out, sign up now. New membership is one of the keys to having quality yet affordable education available at all times, this is an opportunity for everyone to help out.

MEETING DATES: We will have discussion on the meeting dates for November and December at this meeting. Both regular dates (third Wednesday) come close to holidays, the thinking is to move both to the 2ND Wednesday. Discussion and votes at the October meeting-be there.

I will be asking for volunteers to help with calling members to ask if we can get them to receive this newsletter by e-mail as opposed to US MAIL. The cost saving to the chapter would be very great. Currently we have an estimated 30% of our members receiving the newsletter by e-mail, all copies that go to other chapters OATC or NATC are currently e-mailed. If you would be willing to call 10 to 20 members and explain about the cost savings of e-mail let me know at the October meeting. This would also make it easier on our newsletter editor to have all e-mail.

Thank you for your time and please read the rest of the newsletter carefully as it is full of good deals and time sensitive options.

Ave

William (Bill) McKinney, *Enrolled Agent/Licensed Tax Consultant*

Bill grew up in Medford, Oregon and later San Diego, California. After serving 4 years in the United States Marine Corps, Bill attended Coleman College in San Diego, CA, and received a Bachelor's Degree in Computer Programming. He has worked for more than 13 years within the telephone industry and has over 25 years experience with computers doing data analysis and troubleshooting.

Bill married Debra McKinney in 1995 and they both currently reside in Lebanon, Oregon. He has a grown son and daughter who both live in Phoenix, AZ and is eagerly expecting his first grandchild due to arrive in the fall of 2007.

In 1998 Bill became a Licensed Tax Preparer and in 2000 passed his Licensed Tax Consultant exam. He passed his Enrolled Agents (EA) exam in the fall of 2006. During this time he has worked side by side with his wife Debra in building and expanding her tax preparation business. He has also received personal recognition from the IRS honoring his contributions through education for the Small Business/Self Employed taxpayer.

Bill continues to work in the computer industry full time, currently working for Prologic Inc., at the National Energy Technology Laboratory site in Albany Oregon. He also maintains a Sole Proprietor business that he began in 1998 doing computer consulting, troubleshooting and repair.

Bill loves to teach and has experience doing so at the local chapter level. He has traveled within Oregon teaching at OATC and OSTC chapter meetings. He has a constant thirst for knowledge and typically acquires between 80 to 100 hours of continuing education each year.

His dream is to travel and teach nationally, providing Seminars around the country.



This month's education will be in Corvallis at Tommy's 4th Street Bar and Grill) Education will be presented by Bill McKinney and the topic will be AMT.



News From the Editor

***Please Please Please
We need your help!!!***

If you are not getting this newsletter via email please let me know your email address so I can send you the newsletter electronically. We are spending a lot of money each month on postage, as well as the cost to produce printed copies of the newsletter. If we could send it electronically to all of you who have email we would save a lot of money! We understand not everyone has email and we will always send a hard copy via US Mail to those who do not have email. My e-mail address is: joanne@libertytax.com.

New Interview-Style Online Application for EINs!

News From The

IRS



The IRS has developed a new "interview-style" application for acquiring Employer Identification Numbers (EINs), which is supposed to be easier than filling out a Form SS-4. They ask the questions and you give the answers. The information is validated and you get your EIN immediately upon completion. You simply download, save and print your EIN confirmation. It's as simple as that! Go to

<https://sa1.www4.irs.gov/modiein/individual/index.isip>

to apply online. The application is available during the following hours (Eastern Time): M - F: 6:00 am to 12:30 am on Sat: 6:00 am to 9:00 pm and Sun: 7:00 am to 12:00 am

Source:

<http://www.irs.gov/businesses/small/article/0..id=102767.0.html> / Lane County Chapter OATC Oct Newsletter

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. Sept. 19, 2007**

Location: Tommy's 4th Street Bar and Grill, Corvallis, OR

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

Minutes of the last meeting were in the newsletter. No corrections. Minutes were accepted as printed.

Treasurer's Report

Total Assets: \$11, 647.05

Total Checking/Savings: \$423.45

There were 27 members present

Upcoming Chapter Education:

October--Bill McKinney on AMT

November--ODR on employer VS independent contractors and Oregon regulations

State Education:

Fall Seminar will be on Adult Foster Care at Allied Waste in Albany and will be taught by our own Debbie McKinney. **Date:** October 6, 2007, **Time:** 9:00 am - 4:00 pm, **Cost** (to our members): \$45.00

Unfinished business:

Budget: Meeting set up for next Tuesday to review budget that Tom Dundas has prepared.

CD: Coming due at the end of the month, so he has asked permission to "shop" for a better rate. Proposes rolling out the money to the savings account and then rolling 10,000 into a new CD. Discussion about probable upcoming education determined that some expenses cannot be avoided completely. Motion made by Pamela Doerksen that we approve a decision made by the chapter officers at the budget meeting on Tuesday, Sept. 25. The motion was seconded by Tina Fitzmorris. Motion was approved by vote.

Expenses: Our chapter is spending \$83 a month on postage and copying fees. If you are able and willing to receive your newsletter by email (or go to the NATC website) please let Jo Anne Vetter know. This will help save our chapter money.

New Business:

Ave Giddings was approached by the Salem Chapter about joining together to have a seminar on Military Considerations on November 17th in Salem. The purpose of this education is to help with improving our membership numbers. Eric Arnoldus will teach this class for free. We would need to help with mailing fees. We do have a budget item for new member recruitment and can look into that as a way to cover the fees. Kari Lasswell moved that we use the budget and keep such in budget for future membership drives. The motion was seconded by Jo Anne Vetter. The motion was approved by vote.

There being no further business the meeting adjourned at 7:07 pm.

The education was presented by Thomas Gibson, CLTC, CSA, Certified LTC Planner. Thomas spoke about HSAs, Fringe Benefits, and the IRC

Respectfully submitted,
Brandie Stucky - Secretary

**OATC - Mid-Willamette Chapter
Budget forecast
July 2007 through June 2008**

Income

Membership Dues	1700
Advertising	0
Fall Seminar	1800
Quick Finder	
Rebate	50
Raffle	50
Supply Order	75
Education (2) Hr	0
Interest On CD	200

Total Income **3875**

Expenses

Convention	1750
Membership/Promo	100
Meeting Exp. Copies	250
Exp. Meals Speaker	150
Speaker Fees	700
Office/Supplies/Exp	50
News Ltr Copies	500
News Ltr Postage	500
Seminar Facilities	0
Seminar Flyers	120
Seminar Handouts	130
Seminar Mileage	20
Seminar Postage	400
Seminar Refreshments	100
Seminar Speaker Fees	720
Membership Seminar	200

Total Expenses **5690**

Net Income/Loss **-1815**



**Salem and Mid Willamette
Chapters
Presents**



**Mr. Eric Arnoldus
Speaking on Military Issues**

WHEN:

Saturday November 17, 2007

WHERE:

Scottish Rite Masonic Center
4090 Commercial Street Southeast
Salem, OR 97302
(503) 363-9240

Kuebler Exit off of I 5 Go West
Turn Right on Commercial Street.
Next Door to McDonalds

Sign In	8:30 AM Till 9 AM Coffee and rolls provided
Morning	9:00 AM Till 12:00 PM
Lunch	12:00 PM Till 1:00 PM
Afternoon	1:00 pm Till 4:00 PM

COSTS:

OATC Members \$20.00 includes
Lunch

NON-Members \$115.00
This price includes Lunch and a 1
year OATC Membership!

Eric Arnoldus, LTC

Eric Arnoldus graduated from Eastern Oregon State College in 1989, and has been a Licensed Tax Consultant since 1991. He is currently the president of the Blue Mountain Chapter of OATC, after serving several terms as vice president. He is also the 3rd Vice President of OATC, overseeing chapter development, officer training, SOP's, and member services. He is visiting all seventeen of the chapters of OATC, asking for help in ideas to benefit all of the chapters in their endeavors, and offering his help in developing each chapter. As the former 2nd Vice President of OATC, he feels that education is the most important benefit that OATC offers to practitioners. He feels qualified to speak on tax issues for military members, as a member of the Army's Reserve Component since 1985, and a survivor of a series of battles with the Army's pay branch. He was mobilized in 2004 and sent to Afghanistan for a year, where he assisted the Afghan National Army with starting their academy, and then with designing their force structure. While there, he was able to expand his knowledge of pay issues for military members, and enjoys sharing his experience with others.

This is a great opportunity to get 6 hours of quality education from a wonderful speaker who really knows his subject, AND a perfect opportunity to convince someone you know who isn't yet an OATC member to join! If you are all ready an OATC member the cost to you is only \$20 (for lunch) and for those who are not all ready OATC members the cost is \$115.00 - this \$115 not only gets them 6 hours of great continuing education but a years membership in OATC! What a bargain! So call all your fiends and sign up now.

This page is page 3 of the supplies order form on the mailed copies and is intentionally left blank on the e-mail pdf version.



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	Donna Gilmour 503-581-9718	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