



# Mid-Willamette Chapter

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

November 2008

## Meetings

November Meeting will be Tuesday 11/4 in Corvallis at Tommy's 4th St Bar and Gril. The address is 350 SW 4th St. and their phone number, should you need it, is 754-7622

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

## News From the Editor

*This is the first newsletter that we are emailing only (except for the two who have asked to be kept on the US Mail list.*

*Thank you  
Jo Anne Vetter*

## Inside This Issue

Presidents Corner.....	1
Education .....	1
Minutes .....	2

### Newsletter Contact

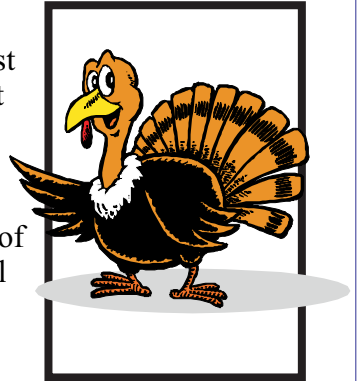
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**Deadline:** Please submit information by the first week of the month

## President's Corner *Message from the President*

Hello Fellow Tax Professionals,

I would like to say this has started out to be the best Post Tax Season ever, though with the stock market flipping back and forth, the job and economic outlook appearing bad I am afraid that won't be the first thing coming out of my mouth or the thought that keeps reverberating in my head. We have one of the Nation's most important Presidential races of all time.



So with all that said, the best recommendation I would make to all of us is to spend many hours considering our State and Nation's situation and then make the best decision you can and VOTE. Keep your head about you, stay in touch with your friends and families and prepare for the coming weather.

Also, keep your ears open on the many changes that have occurred or are likely to happen once a new President is selected. Example is the AMT changes that were voted on last month. Many more changes are expected. Keep current on your education here in Albany at our next month's chapter education in Corvallis at Tommy's. Also, remember we have a very good course scheduled as our Chapter's fund raiser, scheduled in Albany.

My prayers are with all of us and our Nation.

I look forward to seeing you at our next opportunity.

Sincerely,

Bill

This month's education will be the bank managers from the Lebanon and Corvallis branch of Umpqua Bank and one of their investment advisors. We will be going over 529 College Savings plans, the current status of



banks today, what are the changes to FDIC insurance policies and what these changes mean. **PLEASE NOTE: WE DO NOT YET HAVE APPROVAL FOR CE FOR THIS EDUCATION - IT IS POSSIBLE YOU WILL NOT GET ANY HOURS FOR THIS MONTHS EDUCATION. We will not know for sure until the night of the meeting.**

December's education will be Cathy Denver from the Oregon Unemployment Dept.

*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  
Tues. Oct. 7, 2008

**Location:** Tommy's 4<sup>th</sup> Street Bar and Grill, Corvallis, OR

The meeting was called to order by President Bill McKinney at 6:00pm

**Minutes:** The minutes were read. The minutes were accepted as read.

**Treasurer's Report**

Total checking/savings: \$9,674.75

Total assets: \$10,002.75

There were 14 members and 2 guests present for the business meeting.

**Fall Seminar:**

**Rescheduled!!** Saturday Nov. 8<sup>th</sup>, Albany, OR at the Albany Allied Waste Management building. This is a 6 hour course and the speaker, Michael Malody, specializes in tax issues with Clergy. We have internet advertising for this event, which is our annual fundraiser.

**Chapter Education:**

Next month's chapter meeting will be held at Tommy's 4<sup>th</sup> Street Bar and Grill in Corvallis, on November 4th. The subject is TBA. Also, we are still looking for education for December's meeting.

December 8<sup>th</sup>, here in Corvallis, IRS will have a 6 hours presentation. More details to follow.

January - March meetings will be held in Albany at Elmer's Restaurant. These meetings are moderated round table discussions.

Also, discussed possibly having a bank representative come and discuss some the issues surrounding the current financial crisis and how this may affect us and our clients.

Other education: as always the tax practitioner liaison meeting is held in Salem and is worth 2 hours of credit. This month it is the 4<sup>th</sup> Friday.

**Old Business:**

Tina Fitzmorris has now agreed to stay on as 2<sup>nd</sup> Vice President, so we no longer need someone to cover that position.

President, Bill McKinney made sure that all members were aware of our new "star" program. This program helps our chapter members earn chances to win monetary help for attending convention.

**New Business:**

Cathy Baker will take over the treasurer position in December or January. She is taking over for Tom Dundas who has a conflict with our new meeting time. We need to find out if Cathy Baker can just be appointed to the position or if she has to be elected. Tom Dundas, our current treasurer, will still take care of the group services order.

There being no further business, the meeting was adjourned at 6:57 pm.

The education was provided by Ron Wagner and Jane Billings from the Board of Tax Practitioners with an overview of the Board and their practices.

Respectfully submitted,

Brandie Stucky, Secretary



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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

<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