



**OREGON ASSOCIATION OF TAX CONSULTANTS
MEMBERSHIP APPLICATION**

Sponsor _____

Name _____ Please Print _____ Home Phone _____ Business Phone _____

Address _____ Street _____ City _____ State _____ Zip _____

Sole Practitioner
 Partner
 Employee
Name of Firm _____ E-Mail Address _____
Lic# _____

Prior OATC Yes No Please Indicate Chapter Preferred _____ License Designation _____
 Regular Membership Associate Membership

I hereby apply for membership in the local _____ Chapter. I agree to abide by the Bylaws of the Association and to conduct my tax practice in strict conformity to the Code of Ethics and Rules of Professional Conduct. I understand the annual dues are \$90.00, of which \$27.00 is allocated to the chapter. Dues are on a subscription basis and are effective as of the application date for one year. Dues are prorated to April 30 upon renewal. List any specialties (i.e. commercial fishermen, tree farmers, restaurants, etc.) for referral of clients _____

Signature _____ Date _____

2009-2010 Dues: \$90.00 + \$15.00 Initial Processing Fee = Total Due \$105.00 Check Enclosed Payable to OATC: \$ _____ Visa/Mastercard: \$ _____ Discover Card: \$ _____

Credit Card No. _____ Exp. Date _____ Signature/Cardholder _____

OATC Chapters

**Please contact the OATC Office at
1-800-478-4943 for information on the Chapter
nearest you.**

This seminar qualifies for 6 hours of continuing education from the State Board of Tax Practitioners, and Enrolled Agents. We have entered into an agreement with the Office of Director of Practice, Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, section 10.6(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors, and length of class hours. This agreement does not constitute an endorsement by the Director of Practice as to the quality of the program or its contribution to the professional competence of the enrolled individual.

Full refund on cancellations made more than one (1) week prior to seminar. Cancellations made less than one (1) week prior to seminar will be subject to \$25.00 charge and participant will be given handout materials. Attendee substitutions can be made on a like for like membership basis or by paying the difference.

UPCOMING EDUCATION

SAFETY NET 2010

MAY 6, 2010	ALBANY	ALBANY
MAY 7, 2010	BEND	METRO SOUTH
MAY 8, 2010	EUGENE	NORTH COAST
MAY 13, 2010	ONTARIO	K FALLS
MAY 14, 2010	PENDLETON	MEDFORD
MAY 15, 2010	METRO EAST	SOUTH COAST

BASICS & BEYOND 2010

SEPT 16, 2010	BEND
SEPT 17, 2010	KLAMATH FALLS
SEPT 18, 2010	MEDFORD
SEPT 21, 2010	METRO SOUTH
SEPT 22, 2010	LA GRANDE
SEPT 25, 2010	EUGENE
OCT 1, 2010	METRO WEST
OCT 2, 2010	METRO EAST



2009



**SPEAKERS:
LAURIE COLLETT, LTC
AND
DENNIE WHEELER, CPA**

**CPE - 6 Hours
Time 9:00 am - 4:00 pm
Lunch is not included**



OREGON ASSOCIATION OF TAX CONSULTANTS
EDUCATION FUND
3075 SW 234th Avenue, Ste. 110
Hillsboro, OR 97123-8187

PRST STD
U.S. POSTAGE
PAID
PORTLAND, OR
PERMIT NO. 1569

DATED MATERIAL

UPDATE 2009 PRESENTERS

Laurie Collett, EA, LTC



Laurie began her tax career after moving from Montana to complete her Master of Science degree in Mathematics at the University of Oregon. She started out working for H&R Block for five years. Laurie obtained her Consultant's license after two years of work. In May of 1995 she and Mary Beth Wilson started Cascade Tax Professionals, Inc. Laurie took her EA exam that fall and passed. She is still with Cascade Tax after being open for 14 years. Her son is currently at OSU as a graduate student in Organic Chemistry and her daughter started at Linn Benton CC. She likes to garden, knit, quilt and many other things that we never seem to have enough time for.

Dennie Wheeler, CPA



Dennie is a Certified Public Accountant (since 1977) at Wheeler & Grimes, CPAs, LLC in Bandon, Oregon. His practice focuses on tax matters. He was one of seven people in the United States to pass, on the first attempt, the 2002 U.S. Tax Court examination for non-attorneys to be admitted to the U.S. Tax Court Bar. Dennie frequently represents clients in tax controversies. He also holds an Oregon municipal auditor's license, and has co-authored two articles published in professional accounting journals. Dennie taught accounting and applied statistics at Oregon State University for four academic years, and has been an adjunct faculty member for three other colleges.

Update 2009

Dennie Wheeler

12/3 **SALEM** (Thursday)
Black Bear Inn Motel, Inc.
1600 Motor Court N.E.
Salem, OR
Contact: Dawn Davis 503-463-9019

12/4 **BEND** (Friday)
Red Lion Inn of Bend
1415 NE Third Street
Bend, OR
Contact: Jo Dattke 541-382-2084

12/5 **EUGENE** (Saturday)
Veteran's Memorial Hall
1626 Willamette Street
Eugene, OR
Contact: Lee Reams 541-607-5052

12/9 **LA GRANDE** (Wednesday)
Integrated Services Building
1607 Gekeler Lane
La Grande, OR
Contact: Cathy Johnson 541-569-2272

12/10 **ONTARIO** (Thursday)
Holiday Inn Ontario
1249 Tapadera Avenue
Ontario, OR
Contact: Dena Burgess 541-889-5232

12/12 **METRO EAST** (Saturday)
Mt. Hood Comm. College-Room 1710
26000 SE Stark Street
(Off Parking Lot Z)
Gresham, OR
Contact: Mick Chase 503-708-4410

Laurie Collett

12/3 **SALEM** (Thursday)
Black Bear Inn Motel, Inc.
1600 Motor Court N.E.
Salem, OR
Contact: Dawn Davis 503-463-9019

12/4 **METRO WEST** (Friday)
Phoenix Inn Suites
15402 NW Cornell Rd
Beaverton, OR
Contact: Ann Bernton 503-523-9089

12/5 **NORTH COAST** (Saturday)
Holiday Inn Express
204 West Marine Drive
Astoria, OR
Contact: Carole Whitlock 503-738-9686

12/10 **KLAMATH FALLS** (Thursday)
Vineyard Fellowship Church
400 Klamath Avenue
Klamath Falls, OR
Contact: Vickie Baker 541-885-2170

12/11 **MEDFORD** (Friday)
Scottish Rite
955 N Phoenix Road
Medford, OR
Contact: Andy Gough 541-770-9170

12/12 **SOUTH COAST** (Saturday)
Coos Bay Library
525 W Anderson
Coos Bay, OR
Contact: Stella Downs 541-396-5712

12/14 **METRO SOUTH** (Monday)
Clackamas Comm. College
Wilsonville Center
29353 Town Center Loop E
Wilsonville, OR
Contact: Chris Winn 503-538-8222



2009 UPDATE SEMINAR			
<input type="checkbox"/> OATC Member	\$ 80.00	<input type="checkbox"/> 12/03/09 Salem	<input type="checkbox"/> 12/05/09 Eugene
<input type="checkbox"/> NATC	\$ 105.00	<input type="checkbox"/> 12/04/09 Metro West	<input type="checkbox"/> 12/09/09 La Grande
<input type="checkbox"/> NON-Members	\$ 125.00	<input type="checkbox"/> 12/04/09 Bend	<input type="checkbox"/> 12/10/09 K. Falls
		<input type="checkbox"/> 12/05/09 N. Coast	<input type="checkbox"/> 12/10/09 Ontario
		<input type="checkbox"/> 12/11/09 Medford	<input type="checkbox"/> 12/12/09 S. Coast
		<input type="checkbox"/> 12/12/09 Metro East	<input type="checkbox"/> 12/14/09 Metro South

Name: _____ Telephone: _____
 Street: _____ City: _____ Zip: _____
 Email Address: _____
 Member of Chapter: _____
 Amount Enclosed \$ _____ MAKE CHECK PAYABLE TO: "OATC EDUCATION FUND"
 VISAMASTERCARD/DISCOVER # _____ Expiration Date: _____
 SIGNATURE/Cardholder: _____

REGISTRATION MUST BE POSTMARKED BEFORE 11/28/09 TO AVOID LATE FEE
 FOR LATE REGISTRATION, ADD \$15.00
 FEE FOR RETURNED CHECK OR BANK CARD: \$10.00

Please one (1) name only per registration slip

Mail To: OREGON ASSOCIATION OF TAX CONSULTANTS, 3075 SW 234th Ave., Ste. 110, Hillsboro, OR 97123-8187 (503) 726-0100 Fax: 503-726-0101