



Oregon Association of Tax Consultants New Membership Application

Phone: 503-726-0100
 Email: director@oatc-oregon.org
 Web site: <http://www.oatc-oregon.org>

Mail to: 3075 SW 234th, Suite 110
 Hillsboro, OR 97123-8187
 FAX: 503-726-0101

Contact Information	Name (Please print as you wish it to appear on your membership certificate)		
	<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms.		
	Street Address (include Apt #)	Home Phone	Work Phone
		Email	FAX
		Web Site	
	City, State Zip Code	Name of Firm	

Check / Complete All That Apply	Current Position: <input type="checkbox"/> Sole Practitioner <input type="checkbox"/> Partner <input type="checkbox"/> Employee <input type="checkbox"/> Corporate Officer	Certifications: <input type="checkbox"/> Enrolled Agent (EA) <input type="checkbox"/> Licensed Tax Consultant (LTC) <input type="checkbox"/> Licensed Tax Preparer (LTP) <input type="checkbox"/> Certified Public Accountant (CPA) <input type="checkbox"/> Other _____ License Number: _____	Experience and Training: <input type="checkbox"/> Years experience in tax preparation _____ <input type="checkbox"/> Number of hours of Continuing Professional Education (CPE) completed within the 12-month period ending June 30 th : _____
	Please list any National or State Accounting or Tax Organizations in which you are now a member:		
	Please list any specialties (e.g., tree farmers, restaurants, etc.) for client referrals:		

Membership Types and Dues	Membership Type: <input type="checkbox"/> Regular <ul style="list-style-type: none"> ▪ Licensed by the Oregon State Board of Tax Practitioners ▪ Agree to abide by the Articles of Incorporation, <u>Bylaws</u> and <u>Code of Ethics</u> ▪ Possess a background, experience or interests that demonstrate support for the purpose of the Association ▪ Complete a minimum of thirty hours of Continuing Professional Education during each twelve month period ending June 30. <input type="checkbox"/> Associate <ul style="list-style-type: none"> ▪ Persons in any business or profession who are interested in the tax preparation field, and who agree to abide by the Bylaws and the Code of Ethics
	Prior OATC Membership: <input type="checkbox"/> Yes <input type="checkbox"/> No Preferred Chapter (refer to the list on the back of the application): _____
	Amount Due: \$90.00 Annual Dues* + \$15.00 one-time processing fee for new members = \$105.00 Payment Method Amount: _____
	<input type="checkbox"/> Check payable to OATC <input type="checkbox"/> VISA / DISCOVER / MASTERCARD number _____ Card Exp. Date: _____ Signature of Card Owner _____

I hereby apply for regular or associate membership as applicable. I agree to abide by the rules of the Association and to conduct my tax practice in strict conformity to the Code of Ethics and Rules of Professional Conduct. I understand that the annual dues are \$90.00.

Signature of Applicant (required) _____ Date _____

Date Received: Amount:	Control Number:	Notes:
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*** Annual dues are payable in May each year. For new members, the dues for the second year will be prorated by the number of months until the next May, bringing them into alignment with the rest of the members.**



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What is the Oregon Association of Tax Consultants?

The Association, formed in 1972, is open to all tax practitioners in Oregon. The purpose of the Association is to organize tax practitioners to work toward the common goals of protecting our right to practice and to provide the education and guidance to better serve our clients.

The Oregon Association of Tax Consultants (OATC) is not associated with any school or other profit-making group. OATC exists only to provide benefits to the taxpaying public, and to the tax professionals of Oregon.



Goals:

1. Provide consumer protection for the Oregon taxpayer through a quality educational program for our members.
2. Promote high standards of ethical conduct among tax professionals.
3. Provide input to Oregon state agencies regarding the needs of our profession.
4. Promote an awareness of the tax-paying public of the education and licensing requirements in the State of Oregon.
5. Keep our membership informed of legislative measures that may have an effect on our profession.
6. Promote awareness in the State Legislature of the needs and desires of the Tax Professionals in the State of Oregon.

OATC Chapters:

Your membership in a local chapter provides convenient educational seminars, a chapter newsletter and Web site, and association with fellow tax practitioners in your area.

- **Blue Mountain Chapter** – Northeastern Oregon
- **Central Oregon** – Sisters, Burns, Redmond and Bend
- **Clackamas Chapter** – South Portland and Clackamas
- **Jackson County Chapter**
- **Klamath County Chapter**
- **Lane County Chapter**
- **Mid-Columbia Chapter** – The Dalles, Hood River and surrounding areas
- **Mid-Willamette Chapter** – Albany, Corvallis, Lebanon and surrounding areas
- **Mt. Hood Chapter** – Gresham area
- **North Coast Chapter** – Astoria, Seaside and surrounding areas
- **Portland Chapter**
- **Salem Chapter**
- **Treasure Valley Chapter** – Southeast Oregon and Southwest Idaho
- **Tualatin Valley Chapter**
- **Westside Chapter** – Southwest Portland and Washington County
- **Yamhill County Chapter**