



# OSTC TAX FAX

## President's Message

Hello to all our OSTC members. It has been a challenging year, what with gas prices, soaring food costs, and the cost of living rising 10%. We have all had to tighten our belts, which leads me to, how negotiations are going for our upcoming events. I just finished bargaining with the Agate Beach Best Western and in a time when most things are going up, we got a really good deal. I'm in the process of negotiating with 7 Feathers for Convention for the GP Unit in 2023 and UR Unit in 2025, & things are going very well. Then in 2024, we will be heading over the mountain to Eastern Oregon and I haven't started negotiations yet, but will soon.

We had a great Spring Fling at the Agate Beach Resort. Our speakers were fantastic and we were able to provide 4 hours of bonus education, even if, at the last-minute IRS had to switch to Zoom. You need to remember that the bonus education is not included in your registration price, even if we had to do Zoom, it was free to all who attended & you had the option.

The weather was brisk, a little rainy, but a good setting for a group that was inside most of the day. And the cookies with advertisement on them for South Shores Convention were well received, and yummy and all for the same \$155 for the 90% of you who got in on our early bird rate, good job.

Our elections are open this year for President and Treasurer. I will be running again for my last time as President and Dona Cole will be running for the Treasurer position. We so appreciate Dona stepping up to run for our treasurer. Our Vice-President Colleen Barbee has been filling in as Treasurer for way too long, as well as serving as Vice-President for our organization and getting some really great speakers. Good job Colleen!

Convention will be held in Coos Bay on Sept 15, 16<sup>th</sup> & 17<sup>th</sup> at the Mill Casino(1-800-953-4800). The South Shores Unit will be hosting this year's convention & have some wonderful plans in store for all those attending. Remember, we are "the friendly tax organization" so, if you meet 10 new people at convention, write down their names & bring it up to me, the 1<sup>st</sup> 20 folks will win a special prize. Get out there & meet new folks!

Have a wonderful summer ahead and I hope to see you at convention. You are a good, hard-working group of individuals and I'm proud to serve you.

Wanda Wedmore, State President  
Oregon Society of Tax Consultants

## Summer 2022

### State Officers

#### President

Wanda Wedmore  
513 S 4<sup>th</sup> Street  
Springfield, OR 97477  
Phone: 541-746-5751  
[President@ostcinc.org](mailto:President@ostcinc.org)

#### Vice President

Colleen Barbee  
140 N 2<sup>nd</sup> St  
Coos Bay, OR 97420  
Phone: 541-267-0922  
[vicepresident@ostcinc.org](mailto:vicepresident@ostcinc.org)

#### Secretary

Sarah Russell  
4558 Aster St  
Springfield, OR 97478  
541-393-8765  
[secretary@ostcinc.org](mailto:secretary@ostcinc.org)

#### Treasurer

#### Past President

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**Dues Renewal and/or Information Changes**  
**Renewal: \$60 - After July 31, 2022 there is a \$50 late fee.**

WHEN DO OUR DUES EXPIRE? Your OSTC Dues ended on 6/30/22 and it is now time for renewals. Put in your PTIN and follow the instructions from there. Our Dues are \$60 for renewal, plus \$10 more for new member for initiation. You should pay your dues by 7/31/22 to avoid a \$50 late fee. After that date, if you haven't renewed your dues, you will be put on inactive status for 2 months and then dropped. Plus, any events (such as Convention, 6/\$25) will be at the non-member rate if your dues are inactive.

For any changes of your personal information, please go to [ostcinc.org](http://ostcinc.org) under dues renewal – put in your PTIN and make any necessary changes there.

However, if you wish to change units or if you are applying for a Complimentary Membership, (those who have recently passed the test to become a Tax Preparer), you must fill out the appropriate form from the website and mail to:

Sarah Russell 4558 Aster St. Springfield, OR 97478 541-383-8765

**How Can you Get Involved?**

Are you interested in being on a committee or helping OSTC? The following Committees need help: Nominating Committee; Review Committee; Education Committee; Scholarship Committee. Please contact Sarah Russell or Wanda Wedmore if you would like to help out with any of these committees.

**What is the OSTC Good & Welfare Committee?**

If you know that a member in your Unit (or one of their immediate family members) is ill, in the hospital due to an illness, injury, or surgery, lost a loved one, is experiencing some critical problem, or has welcomed a new son or daughter into their family; we want to hear from you. Email Rosalyn Sanford at [goodwelfare@ostcinc.org](mailto:goodwelfare@ostcinc.org) and an appropriate card will be sent to them. Please, no birthdays or anniversaries!

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## Bill Cochran Memorial Award

### For Outstanding Service

*In memory of William F. Cochran, a man who gave of himself and his resources even though he faced insurmountable adversity.*

Who was Bill Cochran? The following is an excerpt from an article written by Ivan C. Hoyer in 1997. "Bill Cochran was a mild-mannered man who did not express strong emotions, but quietly went about doing his job as President of OSTC. He was well organized and very conscientious in managing the affairs of the Association during this pending period of growth of the organization.

His dedication became apparent when he was diagnosed with cancer midway through his term of office and he underwent chemotherapy treatments. As an example of Bill's tenacity and dedication to his office in OSTC, he would go to Eugene for chemotherapy and then attend the Association meeting the same evening during which it was apparent to all that he was in great pain but he passed it off as inconsequential. He did not miss a single meeting during the time of his therapy sessions."

Bill was only in his 50's when he died and the Board of Directors of OSTC was so impressed with his dedication to the association and his fighting spirit, which so exemplified the tenants of OSTC that the Bill Cochran Award for meritorious service above self was created and has been awarded annually since its inception to a worthy recipient.

**As the 2021 recipient of the award along with past winners, this Bill Cochran Award committee has the honor to select the 2022 recipient. But, we need your HELP! If you know someone who has worked hard, both at the unit, but mostly for the State OSTC please send a description of the reason you believe they should be chosen for this award. You can find the nomination form on our website at [ostcinc.org](http://ostcinc.org). Or you can simply submit your nomination via email. The winner will be announced at convention in September.**

Please send your Bill Cochran nominations to **Colleen Barbee** at [bcolleen@frontier.com](mailto:bcolleen@frontier.com). Nominations must be received no later than **August 25, 2022**. Thank You, Colleen Barbee, Bill Cochran Award Recipient 2021.

## OSTC 2022 Individual Unit Award

Convention is coming upon us quickly and it is time to recognize your special member who has gone above/beyond your expectations in performing an outstanding job by contributing their special talents and efforts to your unit.

Whether you have a committee or open voting for your unit's Individual Unit Award please submit your person of choice to receive the award along with a brief explanation as to why they were chosen for the Unit Award. ***Make it fun, add some personal and maybe humorous facts.***

Please give this information to your Unit President or designated member who will forward it directly to me.

Unit Award Certificates will be awarded during the banquet at the OSTC State Convention on Friday, September 16, 2022. Please have your outstanding individual's name to me no later than **August 25, 2022** and send your submissions to the address below.

Sarah Russell  
4558 Aster St  
Springfield, OR 97478  
541-393-8765  
[Secretary@OSTCinc.Org](mailto:Secretary@OSTCinc.Org)



# OSTC'S 42nd ANNUAL CONVENTION

SEPTEMBER 15, 16 & 17

Hosted by the South Shores Unit - "Anchors Aweigh"  
The Mill Casino, Coos Bay, Oregon

DATE PAID BY:	OSTC MEMBER PRICES Fri/Sat Meals included in full registration	NON-MEMBER PRICES Fri/Sat Meals included in reg.
Early Bird Signup online from 7/15 to 7/31/2022	<b>\$185</b> All Early bird <b>Members</b> will be included in 6 scholarship drawings; announced at event.	<b>\$265</b>
Regular Signup 8/1/2022 to 8/22/22	<b>\$210</b>	<b>\$290*</b>
Late Fee After 8/22/2022	<b>\$235</b>	<b>\$315*</b>
1 Day Fee pd if by 8/22/22 which day attending Thurs	<b>\$135 - one day fee-w/lunch provided Friday</b> _____ <b>No banquet meal included, Sat</b> _____	<b>\$175 w/lunch included</b> Friday _____ Saturday _____
Guests Extra Lunch Meal- Fri _____ @ \$30	For Guest Only Extra Banquet-Fri _____ @ \$40 select One: _____ Pork Tenderloin or _____ Black Cod A	Extra Brunch Meal – Fri _____ Sat _____ \$30 Guest

**Special Meal Needs:** Enter food needs online when registering & check nametag at event for your meal ticket.

**Proposed Education – 18 hours CPE included in your registration price, plus**

**3 Free Bonus CPE Hours on Thursday morning 9:00 to noon** (lunch on your own) Topic "Federal Adjustments" by Eric Arnoldus; Our other speakers are: Mike Gordon- "Schedule C & Cost of Goods Sold"; Colby Cross – "Crypto Currency"; Dennie Wheeler- "Sailing Your Way through the 1041"; IRS- "Off Season is In Season for Criminals"; & ODR- "Oregon Family Leave Act"

**MEMBERSHIP INFORMATION – go to [ostcinc.org](http://ostcinc.org) to join**

Lower rates for OSTC Members! \* You can join OSTC online up to 2 weeks prior to convention and receive the member price. You must allow 2 days of membership processing before registering for convention. Membership allows you member discounts at all other OSTC sponsored events (i.e. monthly meetings: fall seminars; 6hr Education for \$25 in Jan & 16hrs for \$155 at Spring Fling in May., Dues are \$60 a year with a onetime \$10 initiation fee. Don't miss out on this opportunity. "At OSTC our members are our most important asset"

**PLEASE - NO FRAGRANCES IN OUR CLASSES – TOO MANY FOLKS W/ALLERGIES - Please be Sensitive! – Cell phones that ring in class-\$5 donation to Toys 4 Tots!**

Cancellations & Substitutions: Refunds available up until 30 days prior to seminar and are subject to a 20% handling fee. Substitutions are only accepted at the same rate paid, up to 2 weeks of event. All substitutions are subject to a \$10 handling fee. No Refunds are allowed after August 15th. If you need to cancel, call Wanda Wedmore @541-746-5751

### HOTEL INFORMATION

**The Mill Casino** Rates Available Wed thru Sunday \$135 + tax. Mention OSTC to get that rate. 1-800-953-4800  
3201 Tremont Avenue. North Bend/Coos Bay, Or 97459 - Camping available \$35 inside area & \$45 Bayside

**SOCIAL NIGHT - Thursday, 9/15 6 to 9pm w/appetizers–Come dress in theme "Anchors Aweigh" "Minute to Win It" – Come have fun & meet new friends! Photo booth, games and prizes.**  
**Both Chair & Table Massages Available Friday & Saturday in Class**

**OSTC General Membership Meeting is Friday 3:30pm to 5:00pm**  
**Election of Officers will take place!**

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## **Meet the Candidates**

**State President** - I'm Wanda Wedmore, and I am seeking re-election for President of the Oregon Society of Tax Consultants. The past two years during Covid has been extremely difficult years and I've learned a lot, especially on Zoom. During those years, I've worked hard to hold the line on expenses, while continuing to provide quality education with the help of our VP, Colleen Barbee. Our membership has grown to expect the best from their OSTC officers and I believe that we have tried to comply with their expectations.

In the past two years I've been working to enhance our lines of communication. Our registration process for seminars has never been better. We are able to receive payments securely online, provide accurate lists of our members for the Units, scan members into our seminars, and provide a way to have our CPE certificates put on each of our private data page on the website. This was all done to lessen the workload of our volunteer officers.

I believe that we need to get back to basics in our families and our Country. Concentrate on what's important and make the most of our time with each other. I strive to keep open lines of communications between the State Board Officers and our members. My goal for OSTC is to be a friendly, open & ethical organization with quality education for a reasonable price. So far, I think we've managed to do just that.

If elected at the September Convention, I will continue to put the needs of our members first. I believe that our members should always receive the best that I have to give. You may not always agree with my decisions, but you will always have an opportunity to discuss them with me.

Thanks for your support.

Wanda Wedmore, President

**State Treasurer** - I am running for State Treasurer because I have watched Colleen juggle both jobs for too long. I served as Treasurer about 15 years ago for six years. That gives me a pretty good idea of what the job entails. It has been streamlined a bit since then with the online registrations and payments. Through the years I have continued to work on the budget and review committees to keep in touch with the financial processes.

I have been a partner in a successful tax practice in Springfield since 1996. I have been an OSTC member for longer than I can remember. In the off-season I try to travel as much as I can for as long as I can. I live with my dog Mixi who is not terribly impressed with my travel but loves me anyway.

Thanks for your consideration.

Dona Cole

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## 2022 Election of Officers

This year elections are for State President and State Treasure. All regular paid-up members are entitled to vote. Ballots and secrecy envelopes are enclosed in this newsletter. Please make sure that you follow instructions so that your ballot will be counted. **Print your name and unit as well your signature on the back of the security envelope.**

### “Official OSTC Ballot” Election of Officers

**Ballots must be mailed by September 1, 2022**

**Please enclose your ballots in the envelope provided. Print & sign your name on the back of the envelope and mail to the Credential Chair  
Rosalyn Sanford – PO Box 1411 – La Pine, OR 97739**



#### **President (2 year term)**

Wanda Wedmore

Write In option

#### **Treasurer (2 year term)**

Dona Cole

Write In option

### **Bylaws & Standing Rules**

Our bylaws and standing rules help make our organization what it is today. The bylaws set our rules that we are governed by as a non-profit and the standing rules help define how we run the day to day activities of OSTC. Please take a moment and visit our website at [OSTCinc.org](http://OSTCinc.org) to view each of these documents. Remember our password to view these documents is "ORTAX".

COMING SOON!

STAY TUNED!

## 2022 QUICKFINDER ORDER FORM

WILL BE COMING OUT VIA

CONSTANT CONTACT (TO YOUR EMAIL ON RECORD)

AND

WILL ALSO BE POSTED ON THE OSTCINC.ORG WEBSITE

THE FIRST WEEK OF AUGUST 2022

PRICE SHEETS FROM QUICKFINDER WERE NOT AVAILABLE AT  
THE TIME FOR THE TAXFAX PUBLICATION

**DEADLINE TO ORDER IS SEPTEMBER 17, 2022**

IF YOU HAVE ANY QUESTIONS CONTACT:

DEANNA MATHIS - [taxladydeanna@gmail.com](mailto:taxladydeanna@gmail.com)

The image shows a screenshot of the 2022 Checkpoint Quickfinder Form 1040. The document is titled "CHECKPOINT 1040 Quickfinder Form 1040" and includes a "US PREPARED FORM" label. It features several tables and sections for tax calculation, including:

- 2022 Tax Tables:** Tables for Taxable Income, Taxable Social Security, and Taxable Dividends.
- 2022 Tax Rates:** Tables for Federal Income Tax, State Income Tax, and Social Security Tax.
- 2022 Tax Credits:** Tables for Federal Income Tax, State Income Tax, and Social Security Tax.
- 2022 Tax Exemptions:** Tables for Federal Income Tax, State Income Tax, and Social Security Tax.
- 2022 Tax Deductions:** Tables for Federal Income Tax, State Income Tax, and Social Security Tax.

The form also includes instructions for users and a footer with the Checkpoint logo.

# **Oregon Society of Tax Consultants, Inc.**

**Sarah Russell, State Secretary**

4558 Aster St.

Springfield, OR 97478

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