



Oregon Society of Tax Consultants OSTC Tax Fax

Presidents Message - Summer 2024

Hello to each of you. I'm so happy to report that I have just finished bargaining for our Spring Fling location for 2025 (May 16 & 17), plus 2 days prior & 2 days after. We are changing venues & I believe you are going to enjoy our new location. We'll be at **Salishan Resort**, Gleneden Beach, OR. You can reserve your rooms now. The traditional rooms w/2 Queen Beds or 1 King will be \$131/night; Deluxe Rooms will be \$159/night plus room tax. For Reservations call 541-764-3600 and mention OSTC or go online, but make sure you enter our code "OSTC2025". If you ask for a room near the "Long House" (where our meetings will be held), you will be able to walk to class each day. A detailed map showing where things are laid out is enclosed. And a great added bonus is that Salishan has waived their normal Lodge Amenity Fee of \$35/night fee for our group. What this covers is:

- | | | |
|------------------------------|-------------------------------------|------------------------|
| 1) On-site covered parking | 2) In room Keurig Coffee | 3) Salishan Seekers |
| 4) Private road beach access | 5) Tesla EV Chargers | 6) Nature Trails |
| 7) Outdoor sports court | 8) Beach Cruisers | 9) Bike Skills Course |
| 10) Indoor Pool/Jacuzzi | 11) In-room Wi-Fi | 12) Preferred Tee time |
| 13) Welcome drink at ck in | 14) Fitness Center w/ Peloton Bikes | |

Check out the map included in this Tax Fax and you should know that the rooms located above the Long House all have covered pathways in case the weather turns misty. Reserve Now, as the final date to do so at our rate will be on that dreaded April 15th date and you might be busy.

We just finished our Officer's Training on July 13th and it went very well. This training is provided to help both past and new officers in ways to be more informed, learn about our website & the many aspects of their job. This year we trained on how Units can hold a Zoom Meeting and how our members need to sign up for a personalized Zoom Account prior to our January 4th 2025, 6/\$25 Seminar. If our members have issues getting onto our Zoom Meeting, they will need to contact their Unit Pres. Hopefully, your Units will be training on this ahead of time.

Our 2024 Convention will be hosted by the High Desert Unit & is coming up fast. In fact, by the time you get this Tax Fax, it will be within a month, Sept 5, 6 & 7. If you haven't registered yet, you still have time. They have worked hard on this Convention and it is going to be great. They have outstanding speakers and a fun time planned with other members. Remember our motto is "we are the friendly organization-where our members come first". Let's all work to get to know one another. Introduce yourself to a new person at convention. It never hurts to meet new folks. Remember, the first 10 people who bring me a list of names of 10 new people you meet will win a prize (and I will have the prizes with me).

Before closing, I just want you to know that we really appreciate our members & will again be giving those members who have completed 10 uninterrupted years of membership, one-half of their dues back. (not the same folks as last year)!

Have a Wonderful, Restful Summer Season
Wanda Wedmore, State President
Oregon Society of Tax Consultants

OFFICER LIST

President

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3157 U Street
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Phone: 541-741-0438
Treasurer@OSTCinc.org

Past President

Deceased



OSTC'S 44th ANNUAL CONVENTION

September 5, 6, & 7

Eagle Crest Resort, Redmond, Oregon

DATE PAID BY:	OSTC MEMBER PRICES	NON-MEMBER PRICES
	Thurs/Fri/Sat Lunches & Fri & Sat Breakfasts & Fri Banquet included in full registration	3 Lunch Meals & 2 breakfasts & 1 banquet dinner
Early Bird Signup online from 7/15/24 to 7/29/24	\$200 All Early bird Members will be included in 6 scholarship drawings; announced at event.	\$280
Regular Signup 7/30/24 to 8/20/24	\$235	\$305*
Late Fee As of 8/21/24 to 9/3/24 Reg Closes	\$260	\$340*
\$150 - 1 Day Fee if paid by 9/3/24 There is no Early Bird Rate on a 1 day fee. Each day is \$150 for members.	\$150 - 1 day fee-w/lunch provided Thursday _____ Friday _____ or Sat _____ No banquet meal included in the one day fee on Fri.	\$175 w/lunch included Thur _____ Fri _____ Sat _____
Guests: Extra Lunch Meals \$30 day: Thur _____ Fri _____ or Sat _____	For Guest Only: Extra Banquet-Fri _____ @ \$40 Roasted Pork - only choice	If you don't plan to attend banquet check NO online.

Special Meal Needs: Enter food needs online when registering & check name tag at event for your meal ticket, and your guest's meal ticket(s). **"PLEASE - NO FRAGRANCES IN OUR CLASSES"**

Education – 18 hours CPE (which includes 3 Bonus Hours on Thurs AM)

Thursday 9-12 "Tax Basics" by Patti King; (lunch 12-1) and 1-5 "Farming" by Laura Strombom and Friday 9-12 "My Client died-what do I do"-Eden Rose Brown; (lunch 12- 1); "Ethics" by Patti King & Saturday 9-12 "At Risk Limitations" by Michael Gordon (lunch 12-1) and 1-5 "CTA Update & Passive Losses" by Michael Gordon

MEMBERSHIP INFORMATION – go to ostcinc.org to join & Register for Event

***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 after signing up for membership before registering for convention to get the member rate.** Membership allows you discounts at all other OSTC sponsored events (i.e. monthly meetings: fall seminars; 6hr Education for \$25 in Jan & up to 18hrs at Spring Fling in May. Dues are \$60 a year with a one-time \$10 initiation fee. Don't miss out on this opportunity. "At OSTC our members are our most important asset"

Great raffle prizes including a 2-night stay at Agate Beach Resort, and many more

Chair Massages Available Thurs, Fri. & Sat. in Class 15 min/\$20

If your Cell phone rings in class, you'll be fined \$5 to be donated to Toys 4 Tots!

Cancellations & Substitutions: Refunds available up until 14 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 21st. If you need to cancel, call Wanda @541-746-5751

RESORT INFORMATION

Eagle Crest Resort: 1522 Cline Falls Hwy, Redmond, 97756 Rates available: Wed thru Sun; Dbl Queen \$159.00; 1 bedroom suite \$179; 2 bedroom condo \$229; 3 bedroom condo \$279. All + lodging tax. Must mention Oregon Society of Tax Consultants when calling 1-855-682-4786. **These rates end on 08/05/2024 so book now!!**

FUN NIGHT - Thursday, 9/5/24 - 6:00 to 7:30pm – Mini Golf w/maxi fun

"Come & have fun & enjoy light snacks with us"

OSTC General Membership Meeting Friday, 9/6/24 - 3:30pm to 5:00pm - Election of Officers!



"for a dog gone good time, come join us at Convention"

hosted by High Desert Unit

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 and an appropriate card will be sent to them. Please, no birthdays or anniversaries!

WHEN DO OUR DUES EXPIRE? Your OSTC Dues ended on 6/30/24 and it is now time for renewals. You can do this online by going to OSTCinc.org and click on Dues and then Dues Renewal. Put in your PTIN and follow the instructions from there. Our Dues are \$60.00 for Renewal, plus \$10 more for new members for initiation. You should pay your dues by 7/31/24 in order to avoid a \$50 late fee. After 7/31/24 if you haven't renewed your dues, you will be put on inactive status for 2 months and then dropped. Plus, you will pay the non-member rate for any events (such as Convention) if your dues are inactive. We do not want that to happen. Please renew NOW!

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. Get ahold of Sarah Russell if you can help out with any of these committees.

By-laws & Standing Rules

Our By-Laws and Standing Rules help make our organization what it is today. The By-Laws 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 to view each of these documents. Remember our password to view these documents is "ORTAX".

Meet the Candidates

President: I am running for re-election to the office of President. I have been your State President for many years and feel I can continue to do a great job for our members if re-elected. My **goal is** to take into consideration our finances, only spending OSTC funds as I would my own. In an economy where prices are just continuing to soar, being a careful steward of our funds is important to me. As you know, I have been the one negotiating all the contracts for all State Events for many years and if elected I will do my best to continue to look for venues that will serve the needs of our members by continuing to fight for the most reasonable prices without surrendering the quality. I love staying at five-star venues at budget hotel rates. No second-class establishments for OSTC Members!

I have worked with all the Executive Board Members to bring a cooperative group of diversified folks together to make decisions that would be in the best interest for the Membership. We have tried to do our best to carry out the goals of this organization. However, it is important to me to listen to you, the members, on what you feel is the highest priority for OSTC. I am, and always have been available to our members via e-mail at President@ostcinc.org or via phone at 541-746-5751 & will continue to do so.

I opened my own Tax Office many years ago and have recently added my daughter Kris Tina to the firm. I have been Licensed by the State of Oregon since 1981. My husband Nick & I have been married for over 50 years so you know that I am no spring chicken, I have some grey hairs, but also lots of life's experiences. I had 2 jobs for over 30 years. I was a Union Negotiator for AFSCME, while at the same time running a tax office. We have three grown children and 2 grandkids; Reed is 16 & attends South Eugene High, and Grant is 13 and is on an all-star Soccer Team. We spend our free time camping and with family.

Thanks for your support. Wanda Wedmore State President

Treasurer: I am running for re-election to the office of Treasurer. I have been your Treasurer for the past 2 years and for the most part I have enjoyed serving on the Board and getting to know the membership better. I also served as treasurer for approximately 10 years in the past. I have been in the tax business for 36 years. In 1995 I opened a tax business with my long-time friend Jeannie Bewley in Springfield. We have been together ever since.

My most enjoyable time spent away from taxes is traveling. My travels include: France, Germany, Czechoslovakia, Iceland, Alaska, Eastern Canada, Southeastern US States and local day trips. I find it so restful and really enjoy my time away. When at home I spend my time with my friend and pet Mixi, who loves me no matter what I do, as long as I feed her and takes her for walks. She's not too hot on the clothes I make her wear. She doesn't get to go on the trips with me but is very happy when I come home. I also love to do flower gardening and my favorite flowers are the petunias and begonias in flower pots because I'm not too hot on weeding and you can't find them in the Spring because you're working on taxes.

I am enjoying my time as Treasurer and if re-elected will do my best to make sure our funds are secure and balanced.

Thanks for your support, Dona Cole, State Treasurer

Election of Officers



This year elections are for State President & State Treasurer. 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 as signing your name on the envelope. Ballots must be mailed to the credential chairperson by August 26, 2024. You may bring your ballot to the Annual Meeting during Convention, but it must be turned in before the Annual Meeting so that it may be verified by the credential committee

Ballots must be mailed by August 26, 2024

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



“Official OSTC Ballot” Election of Officers Oregon Society of Tax Consultants

For President: (Vote for One)

_____ Wanda Wedmore, Incumbent - South Willamette Unit

_____ Write in: _____



“Official OSTC Ballot” Election of Officers Oregon Society of Tax Consultants, Inc.

For Treasurer: (Vote for One)

_____ Dona Cole, Incumbent - South Willamette Unit

_____ Write in: _____

OSTC Ivan & June Hoyer Scholarship

- 1) Each year two full scholarship of \$350 and 4 partial scholarships of \$125 each will be awarded to members in good standing who apply. The winners will be randomly drawn from the pool of applications at the Board Meeting in July. **You must apply for the scholarship by July 1st to be eligible.**
- 2) A scholarship application will be available to all members who renew their dues online from May 1 to July 1st. The form will have two check-off boxes: one for the full scholarship and one for the partial scholarship. In applying, the member will indicate that they will attend the Convention in the current year if they win the drawing for the scholarship. If they are willing to accept the partial scholarship, then they must check off both boxes on the application form.
- 3) The full scholarship, up to \$350, is intended to cover the Convention Registration fee, lodging and other expenses. The scholarship will be announced at Convention. Once proof of attendance has been received, the Treasurer will issue a check within 2 weeks.
- 4) The partial scholarship of \$125 will be applied toward the Convention registration fees.
- 5) An Executive Board Officer will select an application from the pool of applicants. The first 2 names drawn will receive full scholarships. The next 4 names drawn will receive partial scholarships if they have checked the second box. The Executive Board Officer will continue to draw until both scholarship boxes have been checked on the application. The last drawing will be for 2 alternates. If the full scholarship winners are unable to attend, then the first partial scholarship winner would move up and so on down the line in the order drawn.
- 6) The Secretary will personally contact the winners to verify that the scholarships will be used. A letter or e-mail will then be sent informing them of the award and the procedures for attending the Convention.
- 7) The persons selected for the full scholarships will not be eligible to apply for a scholarship within the following 3 years.
- 8) The winner's OSTC membership dues MUST BE CURRENT AS OF THE DATE OF APPLYING WHICH IS JULY 1ST OF EACH YEAR TO BE ELIGIBLE FOR THIS SCHOLARSHIP.

Dues Renewal and/or Information Changes

If you wish to renew your dues or change your personal information, please go to ostcinc.org and select 'Dues' from the left column, then *Membership Renewal*.

Enter 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, State Secretary at PO Box 7206 Springfield, Oregon 97478

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 during 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 2024 recipient of the award, along with past winners, Wanda Wedmore, Colleen Barbee and Jennifer O'Halloran, this Bill Cochran Award committee has the honor to select the 2024 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 provide a description of the reason you believe they should be chosen for this award. You can find the nomination form on our website at www.ostcinc.org. Or you can simply submit your nomination via email. Winners will be announced at convention in September.

There are no written criteria for the Bill Cochran Award. However, the committee looks for someone who has given above and beyond the call of duty, whether it is on the state and/or unit level. Since the Unit Award is given for local outstanding service, more weight is given to those with outstanding service on the State level, as was Bill Cochran. Please send your Bill Cochran nominations to or president@ostcinc.org. Nominations must be received no later than August 15, 2024.

Thank You,

**Crystal Hawley, Recipient
Bill Cochran Award Recipient 2023**

OSTC 2024 Individual Unit Award

Convention is coming upon us quickly and it is time to recognize your special member who has gone above and 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 who will be receiving 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 6, 2024. Please have your outstanding individual's name to me no later than August 15, 2024, and send your submissions to the address below.

Kathy Dietrick & Cindy Johnston, Unit Awards Chairpersons
Dhotrodplace@msn.com



MAP KEY

-  LODGING
-  BUILDINGS
-  COVERED WALKWAYS
-  FOOT PATHS
-  NATURE TRAILS
-  ROADS
-  STOP SIGN
-  TRAFFIC LIGHT
-  GOLF GREENS
-  RECREATION
-  PICNIC AREA
-  FIRE PIT
-  WATER REFILL STATION
-  DOG WASHING STATION
-  ELECTRIC VEHICLE CHARGING
-  ICE MACHINE



SALISHAN

COASTAL LODGE



- SALISHAN MARKETPLACE**
- Adventure Collective
 - Beachcrest Brewing Company
 - Cascade Sotheby's International Realty
 - Coffee and Cravings
 - Depoe Baykery
 - Fitness 101
 - Gentleman's Hair Co.
 - Hopscotch Toys
 - JDC Fine Art
 - Mangia Italian Restaurant and Bere Wine Bar
 - Pacific Coast Chiropractic
 - The Players Lounge
 - Rowboat Gallery
 - Sirens' Sweets
 - Squatchsami
 - Unique and Knotty

PACIFIC OCEAN

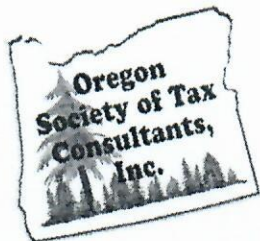
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Oregon Society of Tax Consultants, Inc.

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«First name» «last name»

«Street1»

«City», «State» «Zip»

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Inside This Issue

President's Message

Convention Outline

Bill Cochran Memorial Award Nominations

Unit Award Nominations

State Officer Elections Ballot

Hoyer Scholarship Criteria

Membership Dues Renewal/Information Change

Salishan Map

Quickfinder Order Form