
OSTC Tax Fax

Oregon Society of Tax Consultants

Presidents Message

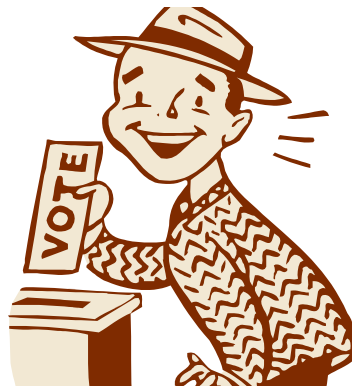
Hi everyone and isn't it great that we are mostly through the tax season and still alive and kicking. It seems that the tax season just keeps stretching out longer and longer each year, and with all the new tax regulations we should certainly be assured of job security.

This has been a good year for OSTC. Our membership has grown to over 600 members, our seminars have all made profits, despite our best efforts (even with maintaining the same low registration rates for the past several years), we've had record number of attendees at our seminars, and we have a really awesome group of board members volunteering their time to continue to make this a great organization to be a part of.

Our convention is fast approaching, Sept 8th, 9th & 10th and we are hoping to have a record high of members attending this year. The Columbia River Unit has been working hard to bring us the very best speakers, great entertainment, lots of door prizes with friendly attitudes. The Spirit Mountain Casino will be a new place for OSTC to hold an event, but we have heard only the best about them. And attendees do not have to walk through the casino to get to classrooms. Please remember to check with your unit to see about what color T-shirts they are wearing, as I'm sure we'll have a little friendly competition and want everyone to be included. The theme this year is: "The Spirit of Education with Mountains of Fun" and that's just what the Columbia River Unit is planning for all of us. As my challenge to each of you this year, try and introduce yourself to 10 new people at the convention. And the first 20 people who come up and introduce themselves to me and can name 10 different American Indian Tribes native to the State of Oregon will receive a special gift. Looking forward to seeing each of you there.

Have a wonderful summer and go out and do something different and fun with your family and friends. Life is too short to do nothing but work, work and work.

God bless each of you
Wanda Wedmore, OSTC
State President



Ballots Enclosed

Summer 2011

State Officers

President

Wanda Wedmore
513 S 4th Street
Springfield, OR 97477
Phone: 541-746-5751
wwedmore@msn.com

Vice President

Marge Hotz
415 NE Franklin
Bend, OR 97701
Phone: 541-385-5043
margehotz@bendbroadband.com

Secretary

Renee Burchett
P.O. Box 2765
Salem, OR 97308
Phone: 503-930-3356
ReneeOSTC@yahoo.com

Treasurer

Dona Cole
P.O. Box 883
Springfield, OR 97477
Phone: 541-741-0438
DonaOSTC@aol.com

Past President

Pamela McBee
34753 Seavey Loop Rd
Eugene, OR 97405
Phone: 541-485-2100
pammcbec@emgwhyte.com

2011 Annual Convention

The Spirit of Education With Mountains of Fun!

Hosted by: Columbia River Unit

18 Hours of Education
September 8th, 9th, and 10th
Spirit Mountain Casino
Grande Ronde, Oregon

Schedule Highlights:

Thursday, September 8th

- Brian Wozniak & Ira Rosenberg
- Evening Fun - Wear your unit colors!

Friday, September 9th

- Ron Wagner & Jean Andrews
- General Membership Meeting
- Awards Banquet

Saturday, September 10th

- Debbie Mckinney & Sam Peden

Registration will begin on Thursday morning at 8:30 a.m. with the first class scheduled for 10 a.m.

Convention Rates

July 15- August 1

OSTC Members	\$185.00
Non-Members	\$225.00

August 2—August 23

OSTC Members	\$210.00
Non-Members	\$250.00

(Postmarked by Aug 23, 2011)

ONE DAY PRICE

OSTC Members	\$100.00
Non Members	\$125.00

Brian Wozniak *IRS Agent* will provide instruction on material relating the tax examination. Deliberating on the intensifying changes in areas involving Tax Professionals. Updates from the IRS' Interpretation. **2 CPE Credits**

Ira Rosenberg, EA Training on Circular 230. regulations governing the practice of Attorneys, CPA's, EA's, Enrolled Actuaries, ERP Agents, and Appraisers before the Internal Revenue Service. **3 CPE Credits**

Ron Wagner *Executive Director of The Board of Tax Practitioners* will offer information on the tax preparation exam to ensure Oregon Tax Professionals are competent and ethical in their profession. Centering on testing requirements introduced in 2010. **2 CPE Credits**

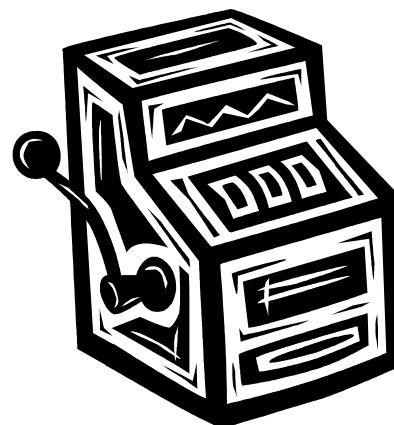
Jean Andrews *A Self-employed Tax Consultant, EA and Fiduciary Consultant* will instruct one hour on the Enrolled Agent examination where she has a 70% passing rate; one hour on Trust and one hour on tax preparation for un-documented individuals. **3 CPE Credits**

Debbie McKinney of The Tax Professors will introduce her topic of *Tax Goulash*". She has assembled information that emphasizes areas that are not offered to new preparers in their Basic tax classes, recounting miscellaneous items that are missed on tax returns. **4 CPE Credits**

Sam Peden will wrap up the Convention with the analysis of the **State** Collection process. Come find out the divergence between the Federal and State collection practice as it relates to tax debt and resolution. **4 CPE Credits**

Check Us Out
On the Web!

www.ostcinc.org



Upcoming Events:

- *2011 Convention at Spirit Mountain Casino in Grande Ronde, September 8th to 10th*
- *Spring Fling 2012 at The Shilo Inn in Newport, May 18th & 19th*
- *2012 Convention at The Riverhouse in Bend, September 20th to 22nd*

Fall Convention Flyer available at www.ostcinc.org

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. Bill was only in his 50's when he passed away and the Board of Directors of OSTC were 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. The award has been given annually since it's inception to a worthy member recipient.

A committee has the honor of selecting the 2011 award recipient, but we need your help. Please, if you know someone who has worked hard, both for the unit and the state, send us your nomination and description of the reason you believe they should be chosen for this award.

BILL COCHRAN AWARD:

The Bill Cochran Award is the most prestigious award given by this organization. Please consider nominating an individual who has shown initiative and willingness to help for the good of the order beyond the call of duty.

I/We _____ would like to nominate _____ for the Bill Cochran Award because:

Please submit this form to :

Millie Jackson - 2804 NE 25th Ave - Portland, OR 97212-3423 - E-mail: Elderfj@comcast.net

DEADLINE August 26, 2011

UNIT AWARD:

I/We _____ would like to nominate _____ for the _____ Unit as our unit award winner because:

Submit this form to your units Unit Award Chairperson or President.

After Your Unit has chosen then Please submit the recipients form to:

Cindy Johns - 7586 Monument Drive - Grants Pass, OR 97526 - E-mail: gpunitostccindy@hotmail.com

DEADLINE August 26, 2011

Election of Officers

This year elections are for State President, State Secretary, and 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.** **Ballots must be mailed to the credential chairperson by August 26, 2011.** You may bring your ballot with you 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

Meet the Candidates:

President:

Wanda Wedmore

Bio: Hello everyone, my name is Wanda Wedmore and I am once again running for President of the Oregon Society of Tax Consultants. In the last 2 years I have been committed to holding the line on expenses, while continuing to provide quality education. In that time our treasury has grown substantially, our membership has risen by over 10%, while still paying attention to our current member's needs. I believe that by listening to our members and trying to meet those needs, we will be a stronger and better organization and I am committed to doing just that.

I have been in OSTC for well over 25 years and have served on the State Board for 12+ of those years. I have served the South Willamette Unit as President for over 10 years, Secretary 2 years and past president/membership of our unit for the past 2 years. I have always had a special place in my heart for our members. I believe that by being friendly, open and most importantly honest with our members is the only way to lead any organization. You may not always agree with my decisions, but you will always have an opportunity to discuss them.

If elected in September, I will continue to put the needs of our members first. I realize that being President is not always easy, nor popular, but I promise I will continue to do what is best for you and our members and organization.

Thank you for your support
Wanda Wedmore, President
Oregon Society of Tax Consultants

Treasurer:

Jennifer O'Halloran

My name is Jennifer O'Halloran and I would like to put my skills to work for you at the Oregon Society of Tax Consultants as your State treasurer. I'm a QuickBooks Pro Advisor, Licensed Tax Consultant and Enrolled Agent. I use these skills in my business that was established in 1998.

I have a wonderful husband Mike, two grown children, two dogs and very recently a new grandson. I love spending time with my family, digital scrapbooking, beading, and riding motorcycles. My motto is "tomorrow is a good day for a new adventure".

A few years ago, my kids graduated from high school. Needing a new challenge, I got involved with my local unit. For two years I worked with co-chair Maria Arbuckle and an awesome committee to host the Annual State Convention, "National Treasures", A search for the Hidden Tax Code". Currently, I am serving on the Capitol unit board as treasurer. With my knowledge of QuickBooks and other various work I have done for Non-Profit Organizations, I believe my skills would be a good match for our State Board. Please vote for me as your next OSTC State Treasurer.

Election of Officers (continued)

Interim Secretary:

Cecilia Abbas

My Name is Cecilia Abbas and I would like to have the opportunity to serve as your new Oregon Society of Tax Consultants Secretary. I have been the secretary for 2 years for the Benevolent and Protective Order of the Elks Lodge #1664 and Auxiliary President for 2 years for the Fraternal Order of Eagles # 2219. I managed membership and helped both lodges grow in membership through calls and invitations. I think I can do the same for OSTC. I am married to a wonderful man, Dennis, we have 2 grandsons that are delightful. We have just completed the remodeling of our kitchen and living room, I enjoy reading, crocheting, camping, and playing cards and Bunco with my Elk friends.

I have been working for H&R Block for 10 years now and I needed something to do that was industrious so I joined the Santiam unit and became treasurer of our unit. It is fun and I have met some wonderful people through it. With my knowledge of how a non-profit works as far as keeping track of membership, meeting minutes, setting up filing systems and working with QuickBooks Pro, I feel confident that I can do a great job for OSTC. Please support and vote for me for State Secretary.

And....

Maria Arbuckle

My name is Maria Arbuckle and I am married with 2 grown children and 1 granddaughter. I am an Enrolled Agent and Oregon Licensed Tax Consultant. I have a small Accounting & Tax Service in Salem, Oregon. My involvement in accounting and taxes span over 24 years. I have been a member of the OSTC Capitol Unit since 2003. I have not served on the board of my unit nor at the state level. I do have many years of experience working with the Board of Directors of many types of organization since part of the services of my own business is consulting to and providing direction on the functions of boards. This has been solely with non-profit and not-for-profit organizations within Oregon.

I am a self-confessed workaholic so most of my time goes directly to my business and other business ventures. What little free time I do have I spend in my ministry or with my husband at our favorite vacation location, Maui.

I wish to become involved with OSTC at the state level to ensure continued growth of the organization as well as to maintain and increase the education provided.





“Official OSTC Ballot”

Please Vote for Only One From Each Office

For the Office of President

_____ **Wanda Wedmore**

(write in candidate)

For the Office of Secretary

_____ **Cecilia Abbas**

_____ **Maria Arbuckle**

(write in candidate)

For the Office of Treasurer

_____ **Jennifer O’ Halloran**

(write in candidate)

(After voting, enclose ballot in Secrecy Envelope, put in larger envelope, print and Sign your name on back of envelope, and mail to Parliamentarian Emma Leah Handy, as addressed)

OSTC Logos

Please vote for your favorite logo listed below by checking the box. Mail your ballot in the enclosed secrecy envelopes by August 26, 2011



OSTC Ivan & June Hoyer Scholarship Guidelines

1. Each year a full scholarship of \$350 and two partial scholarships of \$125 each will be awarded to applicants. The winners will be randomly drawn from the pool of applications at the Board Meeting in July.
2. A scholarship application form will be sent to all members. The forms **must be mailed by July 5th** of the current year to be eligible for the drawing. 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. When the scholarship is awarded, the registration fee will be deducted from the \$350.
4. The partial scholarships of \$125 will be applied toward the Convention registration fees.
5. The Executive Board will each select an application from the pool of applicants. The first name drawn will receive the full scholarship. The next two names drawn will receive the partial scholarships **if they have checked the second box**. The Officer will continue to draw until both scholarship boxes have been checked on the application. The last drawing will be for one back-up selection. If the full scholarship winner is unable to attend, then the second person drawn will receive that scholarship, and on down the line in the order drawn. If some of the Officers are unable to attend the meeting, the chosen replacement will take their place or the drawing will recycle through the Officers again.
6. The Secretary will personally contact the winners to verify that the scholarships will be used. A letter will then be sent informing them of the award and the procedures for attending the Convention.
7. The person selected for the full scholarship will be ineligible to apply for a scholarship in the following 3 years.
8. The winner's OSTC membership dues **MUST BE CURRENT** by the start of the OSTC convention.

Dues Renewal and/or Information Change

(Not for new memberships)

Name: _____

Address: _____ City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

E-Mail: _____

License #: _____ Unit: _____

____ I wish to change my personal information. Mail to: Renee Burchett, P.O. Box 2765, Salem OR 97308

____ I wish to renew my dues (\$60.00 plus \$10.00 if paid after July 31st)
Mail to: Dona Cole, P.O. Box 883, Springfield OR 97477

Quickfinder®

2011 TAX YEAR PRODUCTS

Special Pricing for Oregon Society of Tax Consultants

Your association receives a donation for each product purchased under this special discount code—and you receive a discounted price on every product!

Unit _____
 Member _____
 Address _____
 City _____ Zip _____
 Phone _____
 E-mail _____

**ORDERS MUST BE POSTMARKED ON
 OR BEFORE OCTOBER 20, 2011**

**Society Discount Code
 Q755**

Quickfinder Products	2011 Re- lease	2011 Quantity		Unit Price	Total
		Print	CD		
Handbooks (2011 Tax Year/2011 Edition)					
<i>Premium Handbook (Combo Indiv/Bus)</i>	Dec 11			\$58.00	
<i>1040</i>	Dec 11			\$35.00	
<i>Small Business</i>	Dec 11			\$35.00	
<i>Tax Planning for Individuals</i>				\$35.00	
<i>Tax Planning for Businesses</i>	Jul 11			\$35.00	
<i>Depreciation</i>	Nov 11			\$35.00	
<i>Accounting and Bookkeeping</i>	Oct 11			\$35.00	
<i>Individuals- Special Tax Situations</i>	Dec 11			\$35.00	
<i>Social Security and Medicare Handbook</i>	Mar 12			\$35.00	
<i>California Tax</i>	Dec 11		N/A	\$35.00	
<i>All States</i>	Feb 12			\$69.00	
Other Products (2010 Tax Year)					
<i>QuickPackage QF-X -- Individual</i>	Feb 12		N/A	\$12.00	
<i>QuickPackage QF-X -- Business</i>	Feb 12		N/A	\$12.00	
<i>Laminated Tax Tables -- Individual</i>	Dec 11		N/A	\$12.00	
<i>Laminated Tax Tables -- Business</i>	Dec 11		N/A	\$12.00	
2011 Total					

SEND ORDERS AND MAKE CHECKS PAYABLE TO:

OREGON SOCIETY OF TAX CONSULTANTS
PO BOX 883, Springfield, OR 97477
SPRINGFIELD, OR 97477
Fax: 541-741-0479 E-mail: donaostc@aol.com

Credit Cards will be charged at the time of the order.

Visa ___ Mastercard ___ Check ___

Account # _____

Expiration ___/___

Signature _____

PLEASE NOTE: This is a bulk order. Your order will be shipped to your Unit representative and is generally available for distribution in January. Items with a February or March release date may require special pickup arrangements by you in February or March. If you would like your order shipped to a different unit please specify on your order form. You may order directly from Quickfinder using our Society discount code. Please call Dona Cole at (541) 741-0438 for details.

Oregon Society of Tax Consultants

P.O. Box 883
Springfield, OR 97477

Phone: 541-741-0438
Fax: 541-741-0479
E-mail: donaostc@aol.com



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Inside This Issue

Presidents Message

Convention Outline

Bill Cochran Memorial Award Nominations

Unit Award Nominations

State Officer Elections Ballot

OSTC Logo Ballot

Hoyer Scholarship Guidelines

Membership Dues Renewal/Information Change Form

Quickfinder & PPC Tax Deskbooks Order Forms

