



OSTC Tax Fax

Oregon Society of Tax Consultants

Presidents Message

Hello Everyone and I certainly hope you're enjoying your summer. We recently held our OSTC Spring Fling and had 3 dynamite speakers and another full house. We have been looking for another venue at the coast for next year, but so far, no luck. We are already gearing up for Convention -Sept 28, 29th & 30th at Seven Feathers. (1-888-677-7771) Get your reservations in soon- mention OSTC. Registration notices will be sent out 1st or 2nd week in August by Constant Contact Chair Lynn Bike, Make sure to Register on our website: OSTCinc.org - under Education.

Officer's Training was held on July 8th at the Springfield Moose Lodge. I believe that we had about 35 unit and state officers who attended. We had an exercise on "being grateful" and we all listed 3 things we are grateful for in OSTC. The majority listed: making new friends; good education at a good price; and having other professionals to discuss tax issues with. Our organization is only as good as the time and effort that we put into it. So, if any of you would like to get more involved in OSTC, please contact me or any of the State or Unit Officers and we'll be glad to get you hooked up. At this time we are looking for a volunteer to step forward and finish out the Secretary's term (1 year), who recently resigned. The Board meets 4 times a year and we reimburse officers for their mileage and hotel. Is this 4U?

In closing, I am dedicated to holding the prices on all our events, which is getting harder and harder. However, we continue to show profits, so why raise prices. Also, please know that my e-mail and phone have and are always open if you have any questions or ideas about how we could do a better job for OSTC. In addition, if you have any topics for education that you would like to see at an OSTC function, please e-mail Colleen Barbee, State Vice- President. You can find all officers' e-mails, phone numbers and when & where the Unit meets on our website. Check us out at OSTCinc.org

Have a truly blessed summer!
Wanda Wedmore, OSTC State President
wwedmore@msn.com 541-746-5751

Quickfinder Order Forms Available on-line! Don't miss out on getting your order in through OSTC and save money for yourself, as well as helping out our Organization. But you must act soon! We need to Order **by Sept 15, 2017** to get you the best discounts!

RIA Handbooks: As a member of OSTC you can receive a "free" RIA Handbook if your dues were Paid by 9/1/17. These books will be passed out at your Unit's 6/\$25 Seminar in January 2018. However, you must pick them up at that seminar or arrange for a friend to get yours that day. We will not be holding or mailing any books after that seminar.

State Officers

President

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

Vice President

Colleen Barbee
140 N 2nd St
Coos Bay, OR 97420
Phone: 541-267-0922
bcolleen@frontier.com

Secretary

Vacant
**Your Name Could
Be Here!**

Treasurer

Catherine Weesner
9915 SE 91st Ave
Happy Valley, OR 97086
Phone: 503-775-3458
Treasurer@OSTCinc.org

Past President

Pamela McBee
34753 Seavey Loop Rd
Eugene, OR 97405
Phone: 541-747-1317
peskypam@outlook.com

OSTC 2017

38TH ANNUAL CONVENTION - "Back to the Country"

Seven Feathers Casino

Canyonville, OR 97417

September 28 thru 30th - 18 hours of CPE



Early Bird-postmarked by 8/25/17:	_____	OSTC Member \$185 *	_____	Non Member \$250
Postmarked after 8/25/2017:	_____	OSTC Member \$210	_____	Non Member \$275
1 Day Fee (Mark which day)	_____	OSTC Member \$100	_____	Non Member \$125

***Postmarked after 9/10/17: ADD \$25.00 Late fee** _____

Special Meal Needs: _____ (see Pam McBee at event) Banquet is a buffet w/tri tip, Cod & sides

Banquet Extra Meal for Guest (\$30.00) _____ Lunch Extra Guest (\$20) _____ (which lunch day; Fri or Sat) mark & include fee

Name: _____

Phone: _____

License #: _____

Address: _____

City: _____

State/Zip: _____

Unit Member of: _____

PTIN: _____

Amt Enclosed \$ _____

Visa _____ M/C _____ Exp Date _____

Security Code _____

Email: _____

Credit Card # _____

Credit Card Signature: _____

(By your credit card signature you agree to the charges as indicated by this flyer depending on the date postmarked)

Register: Online at OSTCinc.org - click Current Education or

Mail to: OSTC Treasurer, Catherine Weesner at 9915 SE 91st Ave, Happy Valley, OR 97086

Fax to 503-771-0506; Scan and E-mail to Treasurer@OSTCinc.org

SCHEDULE OF EVENTS

Thursday -Sept 28th

9:30 to 10:00 Registration
10:00 to 12:00 Bonus – Carrie Harmon – 401K Employers
12:00 to 1:00 Lunch on your own
12:30 to 1:00 Registration
1:00 to 3:00 Dennie Wheeler- Tax Home & Travel Expenses
3:00 to 5:00 Charla Howard- Ethics
5:30 to 9:00 Fun Night

HOTEL INFORMATION: Seven Feathers 1-888-677-7771

Wed, Thur. & Sun...\$95 Fri & Sat \$105

Also available a beautiful RV Park

Banquet is a buffet w/Tri Tip, Cod & Sides

Friday - Sept 29th

7:00 to 8:00 Breakfast
8:00 to 10:00 Jeremy Gilliam- 529 College Planning
10:00 to 12:00 Jonathan Mishkin- Estate Planning for Ranches & Farms
12:00 to 1:00 Lunch- included
1:00 to 3:00 Jonathan Mishkin- Audits
3:30 to 5:30 General Member Meeting
6:30 to 9:00 Banquet & Awards

Saturday - Sept 30th

8:00 to 9:00 Breakfast
9:00 to 12:00 Toija Beutler- 1031 Exchanges
12:00 to 1:00 Lunch- included
1:00 to 4:00 IRS- Brian Wozniak

FUN NIGHT - Thursday

“Get your cowboy on” ---Awards given for your country duds!

Kick up your boots for some line dancing and roping demonstration.

Potato Bar/ No Host Bar

You can also find the Convention Registration Form online and mail it, along with your payment to:
Catherine Weesner, Treasurer, at 9915 SE 91st Avenue, Happy Valley, OR 97086 or Fax 503-771-0506 or
email to treasurer@ostcinc.org

WE NEED YOUR HELP! WHICH COMMITTEE WOULD YOU LIKE TO SERVE ON?? We are looking for members who would like to get involved, **IS THAT YOU?** Descriptions of job duties for these Committees are on our website.

We need help with the following:

Secretary to finish out a 1 year term (appointed by President)
Nominating/Election Committee Chair
Review Committee Member
Tax Fax Editor (only 1 issue a year)
Education Committee Member

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 2016 recipient of the award, along with past winners, Deanna Mathis, Dee Baker, Colleen Barbee and Wanda Wedmore, this Bill Cochran Award committee has the honor to select the 2017 recipient. But, we need your HELP! If you know someone who has worked hard, both at the unit, but mostly for the State OSTC, send us your nomination and 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. Or you can simply submit your nomination via email. Winners will be announced at convention in September.

There is no written criteria for the Bill Cochran Award. However, the committee does look 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 usually given to those with outstanding service on the State level, as was Bill Cochran. Please send your Bill Cochran nominations to myself at sailorlady1@gmail.com

Thank You, Rosalyn Sanford, 2016 Bill Cochran Award Recipient

OSTC 2017 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 your information directly to me.

Unit Award Certificates will be awarded during the banquet at the OSTC State Convention on Friday, September 29, 2017. Please have your outstanding Individual's name to me no later than August 25, 2017, and send your submissions to the address below.

Gloria Sang, Unit Award Chair
Globug50@charter.net
1347 Summit Loop
Grants Pass, OR 97527





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.** Ballots must be mailed to the credential chairperson by August 25, 2016. 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

Meet the Candidates

President

Wanda Wedmore

I am running for re-election to the office of State President. I have been your State President for the past few years and feel I can continue to do a great job for our members if re-elected. My goals are to put the members first, be a friendly organization, and provide good education at a reasonable cost. I have always believed in holding the line with regards to seminar fees, dues and balancing the budget. I want to operate OSTC as I do my own home, where no one is a stranger and all are welcome. I opened my practice in Springfield in 1981. I have been a Licensed Tax Consultant for many years and enjoy what I do (most of the time). My husband Nick and I have been married for 49 years and live in Springfield. While I spend my time doing taxes, he spends his time searching for people with the Lane County Search & Rescue as a Search Coordinator. We have two grown children who live in the area. We spend our free time at our cabin up on the Willamette Pass, and love camping and fishing. However, a lot of our time is spent with our two very active grandsons Reed 9 and Grant 6.

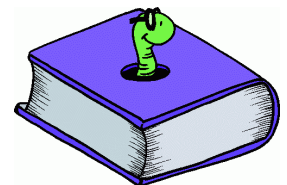
Cathy Baker - Candidate Notified but no bio was submitted

Treasurer – Candidate Notified but no bio was submitted



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 Member Password to view these documents is “ORTAX”.



Ballots must be mailed by September 15, 2017

Please enclose your ballots in the envelope provided. Print & Sign your name on the back of the envelope and mail to the Credential Chair Pam McBee, 34753 Seavey Loop Rd, Eugene, OR 97405



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

For President: (Vote for one)

- Wanda Wedmore, Incumbent (South Willamette Unit)**
- Cathy Baker (Santiam Unit)**
- _____ (write-in)



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

For Treasurer: (Vote for one)

- Catherine Weesner (Columbia River Unit)**
- _____ (write-in)

OSTC BYLAW AMENDMENT PROPOSAL VOTE

A proposal has been made by the OSTC Board to eliminate the proration of dues on a monthly basis for new OSTC members. Please mark the enclosed ballot with your vote.

Bylaw Amendment #1 [] YES [] NO

ARTICLE IV – DUES – Section V: Annual Dues
(Strike out): ~~Dues shall be prorated on a monthly basis for new members.~~

Reason: To streamline the processing of new memberships and eliminate persons joining only to take advantage of reduced OSTC event registration pricing.

OSTC Ivan & June Hoyer Scholarship

1. Each year two full scholarships of \$350 and four 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 form 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 2 full scholarship and one for the 4 partial scholarships. 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. 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 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 the scholarship in the following 3 years.
8. The winner's OSTC membership dues MUST BE CURRENT by the start of the OSTC convention.

This Year's Winners are: 2 Full Scholarships go to Rosalyn Sanford and Dave Culver. The 4 partial scholarship winners are: Marilyn Johnston; Jannel Kropf; Crystal Hawley; and Gaby Teague. Congrats!

Dues Renewal and/or Information Change (Not for new memberships)

Name: _____

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

Home Phone: _____ Mobil: _____

E-Mail: _____

License #: _____ PTIN# _____ Unit: _____

_____ I wish to change my personal information.

Mail to: Catherine Weesner, 9915 SE 91st Ave, Happy Valley OR 97086

_____ I wish to renew my dues (\$60.00 plus \$50.00, if paid after July 31st)

Mail to: Catherine Weesner, 9915 SE 91st, Happy Valley, OR 97086

Oregon Society of Tax Consultants, Inc.
9915 SE 91st Ave
Happy Valley, OR 97086



«First name» «last name»
«Street1»
«City», «State» «Zip»

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