



OSTC Tax Fax

Oregon Society of Tax Consultants

Summer 2016

Presidents Message

This year OSTC has been brought on line. By that, I mean you can now register for our seminars and renew your dues on-line. It has been a real challenge, but I believe it will be worth all the extra work in the end, as some of us come kicking and screaming into the electronic age. And we will still be using Constant Contact as our main way to communicate with you, our members, about upcoming events. So if you are not receiving Constant Contact, please e-mail Barry Schweigert at barry@sfs-tax.com and he will help you work it out. We will still be giving 2 weeks prior notice to our members before each event so you have the first option to register before non-members. Also, all seminars and other information will be on our website and you can sign-up there.

Our 2015 Convention hosted by the Grants Pass Unit was so much fun, especially the social night where we all dressed up as either aliens or cavemen and played games. It was hard to know just who won first prize in costume because they were all so good. We had a great turnout and the Grants Pass Unit had some really good speakers lined up and they did a fantastic job on the entire convention.

Our 27th Annual Spring Fling in Newport in May was packed. We had 211 folks there and after reading the evaluations, we will be cutting it back to 200 for next year. There were four speakers and they were all very good and had great reviews. **“Next year Spring Fling will only be open to OSTC Members!”**

Officer’s Training was held on July 9th at the Springfield Moose Lodge. I believe that we had about 34 unit and state officers who attended. This training is provided to help both past and new officers in ways to be a more informed officer & to learn the many aspects of their job. 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.

Our 2016 Convention is fast approaching. The Santiam Unit will be hosting it on **Sept 15-17 2016. For Registration, please see enclosed flyer.** Remember space is **not an issue** but you’ll still want to get those registrations back in as soon as possible to enjoy the “Early Bird Rates.” You can sign up on line!

At OSTC our motto is “we are the friendly organization where our members come first”. Let’s all work toward that goal to get to know one another. Introduce yourself to someone new at a seminar. It never hurts to meet new folks. Remember, the first 10 people who come up to me at convention and give me a list of names of 10 new people you meet at convention will win a prize (and I will have the prizes with me).

Before closing, I want to thank you for electing me for another term as your President and please know that my e-mail and/or phone are always open if you have any questions or ideas about how we could do a better job for OSTC. Also, 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

State Officers

President

Wanda Wedmore
513 S 4th Street
Springfield, OR 97477
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wwedmore@msn.com

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bcollen@frontier.com

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Sailorlady1@gmail.com

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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
pammcbee@emgwhyte.co



OSTC 2016

37TH ANNUAL CONVENTION

“Heart of the Valley”

Chinook Winds Casino

1774 NW 44th St

Lincoln City, OR 97367

September 15th – 17th



APPROVED
CONTINUING EDUCATION
PROVIDER

20 HOURS OF CPE



Early Bird-postmarked by 8/15/16: _____	OSTC Member \$185 * _____	Non Member \$250
Postmarked after 8/15/2016: _____	OSTC Member \$210 _____	Non Member \$275
1 Day Fee (Mark which day) _____	OSTC Member \$100 _____	Non Member \$125

***Postmarked after 8/29/16: ADD \$25.00 Late fee _____**

Special Meal Needs: _____ (see Pam McBee at event) Banquet is a buffet w/flank steak, chicken & sides

Banquet Extra Meal for Guest (\$25.00) _____ Lunch Extra Guest (\$15) _____ (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)

Registrations: On Line 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 15th

- 8:00 to 9:00 -Registration/Breakfast
- 9:00 to 12:00 -Basics "Keep your green"
Laurie Collett
- 12:00 to 1:00 Lunch on your own
- 1:00 to 5:00 -Forestry Taxation
Tamara Cushing
- 5:30 to 9:00 Fun Night /Tie Dye

Friday

Sept 16th

- 7:00 to 8:00 -Registration/Breakfast
- 8:00 to 10:00 -Marijuana Taxation
Cathy Baker
- 10:00 to 12:00 -Ethics
Jonathon Mishkin
- 12:00 to 1:00 -Lunch Included
- 1:00 to 3:00 -Research Ethics
Jonathon Mishkin
- 3:30 to 5:30 General Member Meeting
- 6:30 to 9:00 Banquet & Awards

Saturday

Sept 17th

- 7:00 to 8:00 -Registration/Breakfast
-Farming Taxation
- 8:00 to 12:00 Eric Arnoldus
- 12:00 to 1:00 -Lunch Included
- 1:00 to 2:00 -IRS Updates
- 2:00 to 4:00 -OREGON Update
(including OTTER)

Convention Hotel Information:

Chinook Winds Casino: 877-4-BEACH1
\$115.00/night
Liberty Inn: \$99/night 541-994-1777

Convention Fees:

Member

Early Bird (postmarked by 8/15/16) \$185.00
Postmarked after 8/15/16 \$210.00
Postmarked after 8/29/16 \$235.00
1 Day Price (add \$25 if after 8/29/16) \$100.00

Nonmember

Early Bird (postmarked by 8/15/16) \$250.00
Postmarked after 8/15/16 \$275.00
Postmarked after 8/29/16 \$300.00
1 Day price(add \$25 if after 8/29/16) \$125.00

Joining OSTC

Applications are available at ostcinc.org
Fill in the form, print and mail in prior to convention to receive the membership price listed on this convention flyer!
(Does not apply if you have been a previous member in the last 3 years)

Non Members pay non member prices but may apply \$10 toward membership if you join at convention.

6 Scholarship Drawings will be held from those members in good standing who registered by early bird deadline.

Have you Renewed Your Membership Yet?

OSTC Units & Locations

- Capital Unit - Salem Area
- Columbia River Unit - Portland Area
- Grants Pass Unit - Grants Pass
- High Desert Unit - Central Oregon
- Santiam Unit - Albany Area
- South Shores Unit - Coos Bay Area
- South Willamette - Eugene/Spgfld/CG Area
- Umpqua Rivers Unit - Roseburg Area

PLEASE NO CELL PHONE USE IN CLASS!!

\$5.00 fine for each violation for Charity.

Fun Night

You do not want to miss this Thursday evening full of fun & craziness!
Dress in tie-dye and get creative!
We'll have a Photo Booth, Finger Foods, Massages & More! Unit Karaoke
Competition-be ready to sing!

"Let's Make This a Fragrance Free Zone"

We have many members who have allergies, so let's have some compassion
And refrain from wearing any perfumes or colognes.

Cancellations & Substitutions

Refunds available up to 10 days prior to convention. Subject to 20% handling fee.
Substitutions accepted.

****20 HOURS OF EDUCATION OFFERED****



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 2015 recipient of the award, along with past winners, Dee Baker, Colleen Barbee and Wanda Wedmore, this Bill Cochran Award committee has the honor to select the 2016 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 taxladydeanna@gmail.com or Dee Baker at dee.bakerostc@gmail.com, or Colleen Barbee at bcolleen@frontier.com or Wanda Wedmore at wwedmore@msn.com.

Nominations must be received no later than August 25th, 2016.

Thank You,

Deanna Mathis, 2015 Bill Cochran Award Recipient

OSTC 2016 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 16, 2016. Please have your outstanding Individual's name to me no later than August 25, 2016, 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 Vice President & State Secretary. 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

Vice President

Coleen Barbee

I am running for re-election to the office of State Vice President. I have been your State VP for two years and feel I can continue to do a great job for our members if re-elected. My goals are to continue having excellent education at all our State functions at a reasonable cost to our members. I will keep the Units up to date on what speakers are available and timely reporting of their education hours. I have been a President of the South Shores Unit for 12 years and Chair for two conventions.

I opened my practice in Coos Bay in 1991. I have been a Licensed Tax Consultant since 1979. My husband Dale and I have been married for 38 years and live in North Bend. We have two grown children who live in the Portland area. We spend our free time camping on the Rogue River and spending time with our two sweet grandsons Nicholas 8 and Alexander 5.

Secretary

Delia Neilsen, EA, Neilsen & Associates, LLC, Roseburg, OR (No bio available at time of printing).

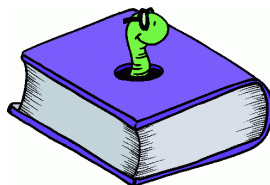


By-laws & Standing Rules

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".

The RIA Handbooks:

As a member of OSTC, you can receive a "Free" RIA Handbook if your dues are paid by Sept 1, 2016. These books will be passed out at your Unit's 6/\$25 Seminar in January. 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.





Ballots must be mailed by August 25, 2016

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 Vice President: (Vote for One)

_____ Coleen Barbee, (South Shores Unit)

_____ (Write-in)



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

For Secretary: (Vote for One)

_____ Delia Neilsen, (Umpqua Rivers Unit)

_____ (Write-in)





OSTC Ivan & June Hoyer Scholarship

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 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 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 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 the 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: _____

Home Phone: _____ Mobil: _____

E-Mail: _____

License #: _____ PTIN# _____

Unit: _____

_____ I wish to change my personal information.

Mail to: Rosalyn Sanford, 15830 Deedon Rd, La Pine, OR 97739

_____ 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 or **REGISTER ON LINE**



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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