

PORTLAND CHAPTER

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503-282-8222
Fax: 503-262-8262

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Treasurer: Mary Manthey
503-274-4226

Membership: Dale Maley
503-233-0602

Newsletter Editor: Dale Maley
503-233-0602

STATE OFFICERS

503-261-0878
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1st Vice President: Susan High
2nd Vice President: Neil Gibson
3rd Vice President: Eric Arnoldus
Secretary: Marie Dunkeson
Treasurer: Janet Dotson
Past President: David Kim

NATIONAL OFFICERS

503-261-1093

President: Jayne Williams
Vice President: John Bell
Secretary: Barbara Culver
Treasurer: Michael Graves

SEPTEMBER NEWSLETTER 2006

PORTLAND CHAPTER
NORMAL MEETING IS 2ND TUESDAY OF
THE MONTH

PRESBYTERIAN CHURCH
2828 SE STEPHENS ST
PORTLAND, OREGON
6:30 PM - 8:30 PM

EDUCATION

September 12th
Mary Pinero/ City and
County Taxes

October 28
6 hour Seminar/James
Jurinski
Corporations – Change of
Entities

November
ODR Representative
Working Family Credit

December 12th
State Tax Board Examiners

January 6th

Multi Chapter Update PSU

February No Meeting

March is our Annual Roundtable

President's Letter

It seems like time just flies anymore and there are never enough hours in a day to do what needs to be done or the energy to do them. It seems that I just wrote this letter but that was a whole month ago.

We have had a volunteer for our vacant Vice President position. Jan Cleys, who is a newer member to our chapter, has agreed to take that position. Any comments or requests for education should be directed to her at jancleys@msn.com or 503 282-8222. We have most of the education lined up till May and probably in the March newsletter we will have a survey for you to fill out with requests and suggestions for the next year's education.

At our last meeting it was agreed that those who attended the State Convention in Pendleton would be reimbursed for ½ of their fees based on their attendance. So if you went please get us a copy of your hours that were credited to you and we will get you a reimbursement. We are hoping to get more of you to attend the convention. There is always lots of education and many other activities. This next year's convention will be in Seaside.

Do not forget the meeting of the Mt Hood chapter with Brian Wozniak on September 21st. The meeting will be held at MHCC in Room 1608, which is downstairs in the second building from the north end of the school. He intends to deliver information on a variety of "IRS hot topics" If you are planning to attend please give me a call at 503-282-8222 as we need to have at least 25 people there for the IRS to continue these monthly meetings. We will continue to make you aware of these types of joint meetings and of course you are always welcome to go to any other chapter meetings for free if you are a member. We had a new person from southern Oregon visit our meeting last month and we welcome and encourage all new members or attendees.

At our last meeting we ended up with a roundtable discussion because Brian had the wrong date. When he did get there the topic was regarding foreign taxpayers and was full of lots of information. We also had a request to have a brief time at the beginning of the meetings for comments, questions, problems or anything you might have. We will continue to allow for that as long as it appears that is beneficial to you.

Remember our officer meetings are 1 hour before the regular meeting and they are open to anyone who wishes to attend. They are very informal and if you have any questions we would be happy to answer them. I am also still hoping that our meetings will become good enough that you will start to bring your fellow practitioners that are not members with you. That is the way we grow.

See you on the 12th.

Valerie Vann

President, Portland Chapter, OATC

Still Learning! Unexpected events on the homefront have interfered with my plans (hopes!) to do an excellent job as newsletter editor. For the financial benefit of our chapter, we continue our appeal to all members who could receive the newsletter by email....please send me your email address. Using email, not only can we save almost \$10/yr. per member on printing and mailing costs, but we can also develop improved and more frequent communications with our members. In future months, I hope to develop our email list as a tool that members can use to communicate more conveniently with other members. So, send your email address and any informational items that could be shared in future newsletters to our newsletter email address, which is OATCPortlandChapterNewsletter@msn.com.

Supply Order Form. Enclosed is your 2006 order form. Please submit your order and payment to Mary Manthey (Treasurer) no later than October 20, 2006. Mary's address is 2211 SW 1st Ave, #1102, Portland 97201. You can reach her at 503-274-4226

REMINDER. Brian Wozniak, IRS, will speak at the Mt. Hood Chapter meeting on Thursday, September 21, from 7 – 9 PM. Please contact Valerie, at 503-282-8222, if you plan to attend. This is a free event, with 2 hrs. CE. Any late info, including the room number, will be posted in the bulletin section on our website.

The IRS requires a minimum number of attendees so that speakers of Brian's background be allowed to speak at educational meetings.

OREGON ASSOCIATION OF TAX CONSULTANTS
PORTLAND CHAPTER
PO BOX 90996
PORTLAND, OR 97290

DATED MATERIAL

ORDER FORM
ENCLOSED!!!!

TO:

* **FREE CPE** *
* **FREE NETWORKING** *
* **FREE HOSPITALITY** *

Disclaimer

The authors have compiled the material printed in this newsletter. The material has been prepared from sources the authors believe to be accurate and reliable. However, the possibility of human and/or mechanical error does exist. The material may omit discussion of exceptions, qualification's, definitions and effective dates. Accordingly, the reader should not rely solely on this material, but should review the original sources to determine the law and applicability to each situation. Neither the editor, authors, National nor State Associations of Tax Consultants will be responsible for any error; omissions, or inaccuracy under any circumstance.

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2006 OATC Individual Member Supply Order Form

Submit completed form and payment to your Chapter Treasurer NO LATER THAN 10/20/06

Item #	Description	Unit Size	2006 Retail Price	OATC Chapter Price	# Units Ordered	Extended Amount
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REFERENCE BOOKS

101	CCH Master Tax Guide	1 book	68.00	30.00		
102	CCH Master Depreciation Guide	1 book	68.00	52.00		
103	CCH California Master Tax Guide	1 book	68.00	52.00		
111	RIA's Federal Tax Handbook 2005	1 book	64.25	25.00		
121	Quickfinder 1040 Handbook	1 book	48.00	35.00		
122	Quickfinder Business Handbook, 1120, 1065, 1041	1 book	48.00	35.00		
123	Quickfinder Tax Planning for Individuals	1 book	45.00	35.00		
124	Quickfinder Accounting & Bookkeeping	1 book	49.00	35.00		
125	Quickfinder Depreciation Handbook	1 book	36.00	30.00		
126	Quickfinder Tax Planning for Businesses	1 book	48.00	35.00		
128	Quickfinder All States Book	1 book	81.00	65.00		
135	The Tax Book - 1040	1 book	45.00	35.00		
136	The Tax Book Deluxe - 1040, Business, Estate	1 book	67.75	60.00		
137	Tax Books - All States	1 book	80.00	65.00		
138	US Government Direct Obligations Report	1 book	56.00	38.00		
139	State Percentages for Municipal Bonds Funds	1 book	56.00	38.00		

ENVELOPES (#10 Envelopes, preaddressed and bar-coded)*

201	Form 8453	IRS Austin TX 73301-0002	box of 250**	19.00	16.00**		
202	Form 1040-V Payment Voucher for Electronic Filing or Form 1040 WITH PAYMENT	IRS PO Box 7704 San Francisco, CA 94120-7704	box of 250**	19.00	16.00**		
203	Form 1040 - REFUND or WITHOUT PAYMENT	IRS Fresno, CA 93888-0002	box of 250**	19.00	16.00**		
204	Form 1040ES - ESTIMATES	IRS PO Box 510000 San Francisco, CA 94151-5100	set of 100	11.50	9.50		
205	Form 4868 EXTENSIONS WITH PAYMENT	IRS PO Box 7122 San Francisco, CA 94120-7122	set of 100	11.50	9.50		
206	Form 4868 EXTENSIONS WITHOUT PAYMENT	IRS Fresno, CA 93888	set of 100	11.50	9.50		

Oregon Individual Returns for All Taxpayers*

211	Form EP - PAYMENT COUPON	ODR PO Box 14725, Salem, OR 97309-5018	set of 100	11.50	9.50		
212	Form 40 - PAYMENT	ODR PO Box 14555, Salem, OR 97309-0940	set of 250**	19.00	16.00**		
213	Form 40 - REFUND	ODR PO Box 14700, Salem, OR 97309-0930	set of 250**	19.00	16.00**		
214	Form 40ES - Estimated Tax and Oregon (4868) Extension Payment	ODR PO Box 14950, Salem, OR 97309-0980	set of 100	11.50	9.50		
216	SP-01 City of Portland / Multnomah County Bureau of Licenses	611 SW Columbia St. Suite 600 Portland, OR 97201-5304	set of 100	11.50	9.50		
217	TM-01 TriMet SE Tax -LTD Lane County - SE Tax - Timber	PO Box 14003 Salem, OR 97309-2502	set of 100	11.50	9.50		
231	OR Combined Payroll Tax	PO Box 14800 Salem, OR 97309-0920	set of 100	11.50	9.50		
235	#11 ES Payment Record - printed goldenrod		set of 100	17.00	15.00		

* All addresses will be checked the week before the order is sent to the printers

** For two sets of 250 items (that is, a box of 500) subtract \$5.00



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Federal Business Returns*

241	Form 1041 Internal Revenue Service Center Ogden UT 84201-0148	set of 100	11.50	9.50		
243	Form 1065 (all returns) Internal Revenue Service Center Ogden UT 84201-0011	set of 100	11.50	9.50		
244	Form 1120 (all returns) Internal Revenue Service Center Ogden UT 84201-0012	set of 100	11.50	9.50		
245	Form 11205 (all returns) Internal Revenue Service Center Ogden UT 84201-0013	set of 100	11.50	9.50		

ADDRESS LABELS* (bar-coded, sheets of 20)

401	Form 1041 - PAYMENT Internal Revenue Service Center Ogden, UT 84201-0148	sheet of 20	3.00	1.00		
411	Form 1065 (all returns) Internal Revenue Service Center Ogden, UT 84201-0011	sheet of 20	3.00	1.00		
421	Form 1120 (all returns) Internal Revenue Service Center Ogden, UT 84201-0012	sheet of 20	3.00	1.00		
422	Form 1120S (all returns) Internal Revenue Service Center Ogden, UT 84201-0013	sheet of 20	3.00	1.00		
423	Form 20 / 20S PAYMENT ODR PO Box 14790 Salem, OR 97309-0470	sheet of 20	3.00	1.00		
424	Form 20 / 20S REFUND ODR PO Box 14777 Salem, OR 97309-0960	sheet of 20	3.00	1.00		
425	Form 20ES - ESTIMATES ODR PO Box 14780 Salem, OR 97309-0469	sheet of 20	3.00	1.00		
431	Form 65 (all returns) ODR PO Box 14260 Salem, OR 97309-5060	sheet of 20	3.00	1.00		
441	Form 41 (all returns) ODR PO Box 14110 Salem, OR 97309-0910	sheet of 20	3.00	1.00		
452	SSA - W-2s and W-3s	sheet of 20	3.00	1.00		
481	Franchise Tax Board REFUND PO Box 942840	sheet of 20	3.00	1.00		
482	Franchise Tax Board BALANCE DUE PO Box 972867	sheet of 20	3.00	1.00		
492	"2006"	sheet of 80	3.75	1.75		
493	"2006 Income Tax Records"	sheet of 14	3.75	1.75		

W-2s

LW2A	Laser Cut Sheets - W-2 Copy A 2-up	50	11.28	5.78		
LW2B	Laser Cut Sheets - W-2 Copy B 2-up	50	11.28	5.78		
LW2C	Laser Cut Sheets - W-2 Copy C 2-up	50	11.28	5.78		
LW22	Laser Cut Sheets - W-2 Copy D 2-up	50	11.28	5.78		
LW2D1	Laser Cut Sheets - W-2 Copy 2 2-up	50	11.28	5.78		
LW2BL	Laser Cut Sheets - W-2 Blank Perforated 2-up	50	11.28	5.78		
L4BL	Laser Cut Sheets - W-2 Blank Perforated 4-up CORNERS	50	11.28	5.78		
L878	Laser Cut Sheets - W-2 Blank Perforated 4-up LETTER BOX	50	11.28	5.78		
LU4	Laser Cut Sheets - Universal W-2/1099 Blank perforated	50	11.28	5.78		
LW2A500	Laser Cut Sheets - W-2 Copy A 2-up	500	66.42	47.46		
LW2B500	Laser Cut Sheets - W-2 Copy B 2-up	500	66.42	47.46		
LW2C500	Laser Cut Sheets - W-2 Copy C 2-up	500	66.42	47.46		
LW22500	Laser Cut Sheets - W-2 Copy D 2-up	500	66.42	47.46		
LW2D1500	Laser Cut Sheets - W-2 Copy 2 2-up	500	66.42	47.46		
LW2BL500	Laser Cut Sheets - W-2 Blank Perforated 2-up	500	66.42	47.46		
L4BL500	Laser Cut Sheets - W-2 Blank Perforated 4-up CORNERS	500	66.42	47.46		
L878500	Laser Cut Sheets - W-2 Blank Perforated 4-up LETTER BOX	500	66.42	47.46		

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1099s

LMA	Laser Cut Sheets - 1099 MISC Copy A	50	11.28	5.78		
LMB	Laser Cut Sheets - 1099 MISC Copy B	50	11.28	5.78		
LMC	Laser Cut Sheets - 1099 MISC Copy C	50	11.28	5.78		
LIA	Laser Cut Sheets - 1099 INT Copy A	50	11.28	5.78		
LIB	Laser Cut Sheets - 1099 INT Copy B	50	11.28	5.78		
LIC	Laser Cut Sheets - 1099 INT Copy C	50	11.28	5.78		
LDA	Laser Cut Sheets - 1099 Div Copy A	50	11.28	5.78		
LDB	Laser Cut Sheets - 1099 Div Copy A	50	11.28	5.78		
LDC	Laser Cut Sheets - 1099 Div Copy A	50	11.28	5.78		
LMBL	Laser Cut Sheets - 1099 BLANK 2-up	50	11.28	5.78		
L9BL	Laser Cut Sheets - 1099 BLANK 3-up	50	11.28	5.78		
L9BLH	Laser Cut Sheets - 1099 BLANK 3-up - NO STUB	50	11.28	5.78		
LMA500	Laser Cut Sheets - 1099 MISC Copy A	500	66.42	47.46		
LMB500	Laser Cut Sheets - 1099 MISC Copy B	500	66.42	47.46		
LMC500	Laser Cut Sheets - 1099 MISC Copy C	500	66.42	47.46		
LIA500	Laser Cut Sheets - 1099 INT Copy A	500	66.42	47.46		
LIB500	Laser Cut Sheets - 1099 INT Copy B	500	66.42	47.46		
LIC500	Laser Cut Sheets - 1099 INT Copy C	500	66.42	47.46		
LMBL500	Laser Cut Sheets - 1099 BLANK 2-up	500	66.42	47.46		
L9BL500	Laser Cut Sheets - 1099 BLANK 3-up	500	66.42	47.46		
L9BLH500	Laser Cut Sheets - 1099 BLANK 3-up - NO STUB	500	66.42	47.46		
LU4500	Laser Cut Sheets - Universal W-2/1099 Blank perforated	500	66.42	47.46		
L1096	Laser Cut sheets - 1096	50	11.28	5.78		
L1096500	Laser Cut sheets - 1096	500	66.42	47.46		

ENVELOPES (W-2 and 1099)

DWMR	1099 Misc/Div - Double Window Envelopes -	50	17.87	6.70		
DW19	1099 Int - Double Window Envelopes	50	14.61	5.29		
DWCL	W-2 Series Double Window Envelopes 2-up	50	17.87	6.70		
DW4MW	W-2 Series Double Window Envelopes 4-up	50	17.87	6.70		
DWU4	W-2/1099 Universal Blank Sheets Envelopes	50	17.87	6.70		

ENVELOPES (oversized, blank)

291	#11 white	box of 500	31.00	26.00		
292	#11 white	set of 100	12.50	11.00		

CLIENT FOLDERS WITH OATC LOGO

601	OATC Cream Linen Covers without pocket	set of 50		26.00		
602	OATC Cream Linen Covers with gusset	set of 25		26.00		

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OFFICE SUPPLIES						
612	Image One Interview Sheet (front/back)	set of 50	9.25	8.50		
701	Sign Here Tags - Small - Red	set of 300	6.50	5.50		
702	Sign Here Tags - Medium - Red	set of 150	6.50	5.50		
704	Sign Here Tags - Large - Red - Post-it	set of 90	10.50	7.50		
708	Privacy Policy	set 100		7.50		
710	License Frames	each		10.00		
TOTAL						
NON-MEMBERS ONLY add 20% on all purchases except Quickfinders and The Tax Book						
TOTAL COST OF PURCHASES						

OATC Chapter: _____
Member Name: _____ Telephone: _____
Mailing Address: _____ Email: _____
City: _____ State: _____ Zip: _____
Check #: _____ Amount: _____

I authorize you to charge this purchase to my MasterCard ☐ Visa ☐ Discover Card ☐ (please check one)

Credit Card Number: _____ Exp. Date: _____ Credit Card Amt: _____

Cardholder Signature: _____

**Mail this completed form along with your check or credit card authorization
to your Chapter Treasurer NO LATER THAN 10/20/06**

BLUE MOUNTAIN

Cathy Johnson
178 Hwy 82
Lostine, OR 97887
(541) 569-2272

CENTRAL OREGON

Rae Ann Curtis
501 NE Greenwood #800
Bend, OR 97702
(541) 382-4551

CLACKAMAS

Becky Klotz
PO Box 1885
Clackamas, OR 97015
(503) 655-4775

JACKSON COUNTY

David Keiser
PO Box 478
Jacksonville, OR 97530
(541) 899-7680

KLAMATH FALLS

Vicky Baker
838 Main St.
Klamath Falls, OR 97601
(541) 884-2747

LANE COUNTY

Dianne Thielman
1177 Pearl St Ste 100
Eugene, OR 97401
(541) 607-5052

MID-COLUMBIA

Mary Linebarger
2751 Webster Rd
Hood River, OR 97031
(541) 386-3392

MID-WILLAMETTE

Tom Dundas
505 Wagon Wheel Drive
Lebanon, OR 97335
(541) 258-5600

MT HOOD

Laurie Mills
PO BOX 1816
Fairview, OR 97024
(503) 492-6606

NORTH COAST

Sandra McDowell
PO BOX 590
Seaside, OR 97138
(503) 738-9515

PORTLAND

Mary Manthey
2211 SW 1st Ave #1102
Portland, OR 97201
(503) 274-4226

SALEM

Robert Kottke
PO BOX 94
Silverton, OR 97381
(503) 873-2819

SOUTH COAST

Kathy Neal
2546 Sheridan Ave
North Bend, OR 97459
(541) 756-2696

TREASURE VALLEY

Ray Rich
505 Perry Dr
Payette, ID 83661
(208) 642-4066

TUALATIN VALLEY

Don Olsen
130 S Main St.
Banks, OR 97106
(503) 324-9020

WESTSIDE

Lynne Smith
PO BOX 1683
Beaverton, OR 97005
(503) 244-9735

YAMHILL

Vickie Wittrock
272 13th St
Lafayette, OR 97127
(503) 864-3401

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