

**OREGON SOCIETY OF ENROLLED AGENTS
BOARD OF DIRECTORS' MEETING**

Friday January 13, 2017

11:00 am to 3:30 pm

1. Call to order - **Kirk Donavin** called the meeting to order.
2. Welcome Board Members, Committee Chairs and Guests - **Kirk Donavin**
3. OrSEA Mission Statement – **Jeffrey Linders** read the Mission Statement.
4. Roll Call; Proxies for absent Board Members – **Jeffrey Linders** roll was taken by passing a sign in sheet.
5. Agenda; Revisions and time frames – **Kirk Donavin** no corrections were noted.
6. Review/Approve October 21, 2016 Meeting Minutes(Posted on web site) – **Jeffrey Linders** (Minutes were tabled until May)
7. Vice President's Report – **Daniel Stearns** reported on the APEX meeting in Orlando he attended. He commented about getting involved with EA education through college curriculum. He also reported on the Tax Payer Bill of Rights. EA's may sit for the LTP test before receiving 360 hours and the Draft copy of the Tax Payers Bill of Rights.
8. Treasurer's Report – **Ira Rosenberg** Profit & Loss Budget vs. Actual and Balance sheet (attached) Ira commented some expenses were from prior year, membership dues are down but dues are up and the lobbyist intervention is still of value. **Maddy Gaoiran** moved that we accept the budget, Marie Linders seconded, the motion passed without dissent.
Bean Counter Tax Services performed an audit of the fiscal year books and found no improprieties (attached). Cletus Hernandez moved that we accept the audit as presented, Marie Linders seconded, the motion passed without dissent.
9. Director's Reports/Chapter Reports
 - a. North Directors—**Rebecca McAllister/Eva Davis** (no report submitted)
 - b. Central Directors—East – **Cindy Petersen**/West – **Cletus Fernandez** (financial reports attached) Reported on education for June and again in September or October.
 - c. South Directors—**Madilyn Gaoiran/June Brock** (report attached) did not meet in November for lack of a quorum. Discussed meeting in Medford with leadership, reaching out to other organizations i.e. CPA's, Attorney's.
 - d. At-Large Director—**Carol Mulder** (no report submitted)
10. Committee Reports
 - a. Membership—**Maria Arbuckle** (not present) (report attached with membership list) discussed getting list of new EA's and reaching out to LTP's & LTC's.
 - b. Media/Public Relations—**Cletus Fernandez** (no report) Maddy asked about informational pamphlet.

- c. Scholarships/Awards—**June Brock** (not present)
 - i. NTPI scholarship applications and information are on the web
- d. Historian—**Sue Bladorn** (no report submitted)
- e. Annual Conventions
 - i. 2017—**Ira Rosenberg** Portland conference projection submitted (attached) reported everything is on track, listed education speakers and gave an overview of the conference.
 - ii. 2018 – **Kirkwood Donavin** Springfield (no report submitted) facility is secured
 - iii. 2019 – **June Brock & Marie Linders** Ashland will head up discussed advertising in Northern California
- f. Education Committee—**June Brock** (no report submitted) Dan said he would speak to June regarding tax court judge.
- g. Communications/Website Committee Report—**Ira Rosenberg**
- h. Legislative Committee – **Daniel Stearns**
- i. Ethics Violations – **Marie Linders** nothing to report (no report submitted) Maddy commented how the IRS was visiting offices looking for Form 8867 & Form 8879
- j. Communications/Website – Ira Rosenberg
- k. Government Relations
 - i. IRS – **Michael Davidson** (no report submitted)
 - ii. DOR – **Cletus Fernandez** discussion centered around i-wire
 - iii. Tax Board – **Barbara Craven** (no report submitted)
- l. By Laws – **Caty Giovinco** no changes to report (no report submitted)
- m. Nominating Committee – **Marie Linders** (report submitted) change was made to Evelyn Davis election dates (initial date should have been 2015 re-election 2017, mandatory end 2019)
- n. Finance & Budget – **Ira Rosenberg**
- o. Policies & Procedures – **Sue Bladorn** (no report submitted)
- p. Strategic Planning (no report submitted)
- 11. President's Report - **Kirkwood Donavin** (report submitted) highlighted Educate America update and the costs associated with it.
- 12. New and/or Pending Business nothing to report
- 13. Good of the Order nothing to report
- 14. Adjourn - **Kirkwood Donavin** Marie Linders moved to adjourn, Maddy Gaoiran seconded, the motion passed without dissent.

Motions:

- 1. Maddy Gaoiran moved that we accept the budget, Marie Linders seconded, the motion passed without dissent.
- 2. Cletus Fernandez moved that we accept the audit as presented, Marie Linders seconded, the motion passed without dissent.
- 3. Marie Linders moved to adjourn, Maddy Gaoiran seconded, the motion passed without dissent.

The January 13, 2017 OrSEA Board Meeting Minutes were prepared and submitted for approval by Jeffrey S Linders Secretary.

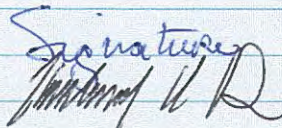


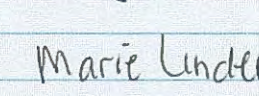
Oregon Society of Enrolled Agents – Mission Statement

- **Foster professionalism and growth of members**
- **Be an advocate of taxpayer rights**
- **Protect the interest of its members**
- **Enhance the role of Enrolled Agents among government agencies, other professions, and the public at large**


OrSEA's elected board of directors is responsible to ensure that the organizational mission statement and strategic goals are adhered to.

Roll Call

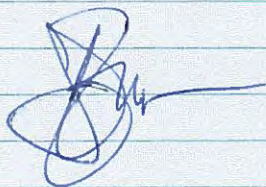
1-13-17

Name	Signature	Title
Kirkwood Donavin		President
Daniel S Yearnis		V Pres
Cletus Fernandez		N. Director
Marie Lunders		

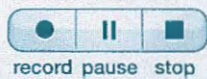
IRA ROSENBERG
Madilyn Gaoiron


EA
EA

Jeff Lunders



See



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2. Welcome Board Members, Committee Chairs and Guests
3. OrSEA Mission Statement – Jeffrey Linders
4. Roll Call; Proxies for absent Board Members – Jeffrey Linders
5. Agenda; Revisions and time frames – Kirkwood Donavin
6. Review/Approve May, 2016 Meeting Minutes(Posted on web site) – Jeffrey Linders
7. Vice President's Report – Daniel Stearns
8. Treasurer's Report – Ira Rosenberg
9. Director's Reports/Chapter Reports
 - a. North Directors—Rebecca McAllister/Eva Davis
 - b. Central Directors—East – Cindy Petersen/West – Cletus Fernandez
 - c. South Directors—Madilyn Gaoiran/June Brock
 - d. At-Large Director—Carol Mulder
10. Committee Reports
 - a. Membership—Maria Arbuckle
 - b. Media/Public Relations—Cletus Fernandez
 - c. Scholarships/Awards—June Brock
 - i. NTPI
 - d. Historian—Sue Bladorn
 - e. Annual Conventions
 - i. 2017— Ira Rosenberg – Portland
 - ii. 2018 – Kirkwood Donavin – Springfield
 - iii. 2019 - Suggestions
 - f. Education Committee—June Brock
 - g. Communications/Website Committee Report—Ira Rosenberg
 - h. Legislative Committee – Danial Stearns
 - i. Ethics Violations – Marie Linders
 - j. Communications/Website – Ira Rosenberg

- k. Government Relations
 - i. IRS – Michael Davidson
 - ii. DOR – Cletus Fernandez
 - iii. Tax Board – Barbara Craven
- l. By Laws – Caty Giovinco
- m. Nominating Committee – Marie Linders
- n. Finance & Budget – Ira Rosenberg
- o. Policies & Procedures – Sue Bladorn
- p. Strategic Planning

11. President's Report

12. New and/or Pending Business

13. Good of the Order

14. Adjourn

Oregon Society of Enrolled Agents
Board Meeting
Umpqua Bank - Springfield
October 21, 2016

Meeting called to order by Vice President Dan Stearns at 11:25 a.m.

There was no quorum so no business was considered that required voting until either other board members arrived or we received additional proxy's. Proxy's were received from: Eve Davis, Evelyn Davis, Jeff Linders, Marie Linders . Attached is sign in sheet.

Mission statement was read by Barbara.

Ira moved to accept the minutes of July 22, 2016 Board Meeting. Maddy seconded.

Vice President report – Daniel Stearns: Oregon tax payer “Bill of Rights” has been sent to committee to write proposal. Could have a hearing next session. Suggested we write letters now about horror stories since session will be during tax season. Ira to put on web site requesting response from other tax preparers.

Tax Board report: Talked about rule changes by Board and who we could hire. Dan going to contact Howard to see if could make any response on rule change. Board position made to Howard and not to Tax Board for retired people. Discussed about what to do after court decision. Have modification to their rule by meeting with Howard.

Financial report - Ira Rosenberg: Ira reported he had made changes to Profit & Loss after last meeting. He presented Profit & Loss showing Budget to Actual for July 1 thru Oct. 20, 2016 as well as the Balance Sheet. Attached are financial reports.

South Chapter report – Maddy Gaoiran: Expressed need for meeting to elect officers. Report attached.

Membership report – Maria Arbuckle: E-mailed her report to Dan. Attached is her report. November 28th at Black Bear Conference Center in Salem is going to be a 6 hour continuing ed. class on Oregon's 17-1/2.

Scholarship report – JuneBrock: No report.

Historian report – Sue Bladorn: No report.

2017 Conference report – Ira Rosenberg: Holiday in Wilsonville has been secured. Ira and Dan will be getting room rates. Meals have not been selected yet.

2019 Conference location was suggested by June for Ashland. Information will be presented at January meeting.

Education report – June Brock: June went over information she had for ideas for classes and speakers. 2017 conference education possible instructors and education topics attached.

Break was taken at 1:10 for lunch and meeting was called back to order at 1:45 after Kirk Donavin arrived.

Website report – Ira Rosenberg: Ira reported since web site is free we have limited storage so can only keep 2 years of minutes.

Legislative report – Daniel Stearns: Dan reported on the taxpayer Bill of Rights under his Vice President's report.

Tax Board continued: Dan & Kirk go to meet with Howard about requesting (not dropping law suit) and let him know steps taken so far are good but needs to go further. Our position is hours are in conflict with the law. After lots of discussions agreement was they meet with Howard. Motion by Maddy for meeting. Seconded by Ira. Motion passed.

By Laws report – Caty Giovinco: Caty reported that Cindy Peterson took position in May 2014 and can run again in 2017. Joyce Davis can run in 2019.

President's report – Kirk Donavin: Ira is going to check with other state websites and use May conference lunch for time to discuss cost of them advertising on our website. Attached is report.

Moved by Kirk and seconded by Maddy to adjourn at 3:25 p.m.

Submitted by acting secretary
Barbara J. Craven

10:41 AM
01/12/17
Cash Basis

**Oregon Society of Enrolled Agents
Profit & Loss Budget vs. Actual
July 1, 2016 through January 12, 2017**

	Jul 1, '16 - Jan 12, 17	Budget	\$ Over Budget	% of Budget
Income				
Chapter Function	1,787.00	0.00	1,787.00	100.0%
Dues				
Dues - Associates	4,891.00	3,736.45	1,154.55	130.9%
Dues - Initiation Fees	36.00	0.00	36.00	100.0%
Dues - Renewals	520.00	0.00	520.00	100.0%
Total Dues	5,447.00	3,736.45	1,710.55	145.8%
Total Income	7,234.00	3,736.45	3,497.55	193.6%
Expense				
AFEX				
Airfare	465.97	600.00	-134.03	77.7%
Lodging	456.37	1,630.00	-1,173.63	28.0%
Total AFEX	922.34	2,230.00	-1,307.66	41.4%
Board Meetings				
Meals for Board	251.20	247.90	3.30	101.3%
Mileage	1,437.00	860.48	576.52	167.0%
Total Board Meetings	1,688.20	1,108.38	579.82	152.3%
Chapter Function Expense	1,787.00	0.00	1,787.00	100.0%
Committee Functions				
Communications				
Website	16.92	56.58	-39.66	29.9%
Total Communications	16.92	56.58	-39.66	29.9%
Government Relations	114.50	0.00	114.50	100.0%
Total Committee Functions	131.42	56.58	74.84	232.3%
Conference Expense				
Travel and lodging for Speakers	-117.90	0.00	-117.90	100.0%
Total Conference Expense	-117.90	0.00	-117.90	100.0%
Legal Fees	0.00	40.00	-40.00	0.0%
Licenses	5.00	0.00	5.00	100.0%
lobbying	1,500.00	1,916.13	-416.13	78.3%
Promotional Expense	336.00	0.00	336.00	100.0%
Supplies	0.00	100.00	-100.00	0.0%
Total Expense	6,252.06	5,451.09	800.97	114.7%
Net Income	981.94	-1,714.64	2,696.58	-57.3%

8

10:43 AM
01/12/17
Cash Basis

Oregon Society of Enrolled Agents
Balance Sheet
As of January 12, 2017

	<u>Jan 12, 17</u>
ASSETS	
Current Assets	
Checking/Savings	
Umpqua Checking	9,715.15
Total Checking/Savings	<u>9,715.15</u>
Total Current Assets	<u>9,715.15</u>
TOTAL ASSETS	<u><u>9,715.15</u></u>
LIABILITIES & EQUITY	
Equity	
Fund Balance	16,808.57
Restricted Fund - Education	1,526.71
Restricted Fund - L Scafidi	548.10
Retained Earnings	-10,150.17
Net Income	981.94
Total Equity	<u>9,715.15</u>
TOTAL LIABILITIES & EQUITY	<u><u>9,715.15</u></u>

Period Ending 7/31/2015

No invoice for Check #1391 made out to Ted Hughes and Associates in the amount of \$300.00.
No invoice for Check #1392 made out to OrSEA in the amount of \$1000.
Could not find payment for invoice from Maria T Arbuckle, EA in the amount of \$28.14.
Could not find payment to Ira Rosenberg for the \$21.34 charged to American Express card.

Period Ending 11/30/2015

Check #1509 voided for NAEA.
Deposit on 10/23/15 includes \$63.68 from Fast Forward Academy and \$56 from Gleim for a total of \$120.39. An addition \$20 from unknown source was added for a total deposit of \$140.39. In QB the \$20 was attributed to Gleim. See copies of checks and deposit slip.
No invoices for Check #1503, or Check #1505.

Period Ending 12/31/2015

No Deposit Slips for Deposits made on 11/12/2015 for \$280.00, and deposit made of 12/16/2015 of \$315.00.
No Deposit Slip for deposit made on 12/17/2015.
I have marked the pages with the incorrect check numbers marked on the invoices.

Period Ending 01/31/2016

On the Reconciliation Detail, there are various checks numbered wrong.
There are no deposit slips for any of the deposits.

Period Ending 02/29/2016

There is no Reconciliation Detail page.
Looks like no activity in February, 2016.

Period Ending 03/31/2016

No invoice for Cletus Fernandez check.

Period Ending 04/30/2016

ProPay Deposit from ProPay should have been \$8500.25 a .25 discrepancy.

Period Ending 05/31/2016

For check #1532 made out to Francis X. Degen, receipts for airfare, mileage sheet, and meals are missing. Also, the Honorarium invoice is missing.
No Deposit slips.
Check #1031 marked on the invoice to Jeff Linders, should actually be check #1531.

Period Ending 06/30/2016 No Deposits Slips

Bean Counter Tax Services



1293 18th Street
Springfield, OR 97477
Phone: (541) 726-0908
Fax: (541) 746-0800
www.beancountertax.com

Review of Oregon Society of Enrolled Agents Financial Records

I, Denise Bean, EA have reviewed the receipts, bank statements and reconciliation reports for fiscal year 7/1/15 to 6/30/16.

I found records to be in date ordered by month and easy to access. All reconciliations were completed through QuickBooks and reconciliation reports were printed. Ending and beginning balances matched bank statement balances.

Most receipts, invoices, copies of checks and deposit slips are accounted for. What is missing is logged below.

I find no evidence of fraud, embezzlement or wrong doing.

I would recommend that invoices or receipts be obtained for all expenses.

Sincerely

Denise Bean, EA

OrSEA - Capital Chapter
Balance Sheet
As of December 31, 2016

	<u>Dec 31, 16</u>
ASSETS	
Current Assets	
Checking/Savings	
WCB Checking	2,271.90
Total Checking/Savings	<u>2,271.90</u>
Total Current Assets	<u>2,271.90</u>
TOTAL ASSETS	<u><u>2,271.90</u></u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	133.13
Total Accounts Payable	<u>133.13</u>
Total Current Liabilities	<u>133.13</u>
Total Liabilities	133.13
Equity	
Opening Balance Equity	2,000.00
Unrestricted Net Assets	-1,639.56
Net Income	<u>1,778.33</u>
Total Equity	<u>2,138.77</u>
TOTAL LIABILITIES & EQUITY	<u><u>2,271.90</u></u>

OrSEA - Capital Chapter
Profit & Loss
October through December 2016

Accrual Basis

	Oct 16	Nov 16	Dec 16	TOTAL
Ordinary Income/Expense				
Income				
Other Types of Income				
Miscellaneous Revenue	0.00	0.00	30.00	30.00
Total Other Types of Inco...	0.00	0.00	30.00	30.00
Program Income				
Program Service Fees	0.00	4,470.00	0.00	4,470.00
Total Program Income	0.00	4,470.00	0.00	4,470.00
Total Income	0.00	4,470.00	30.00	4,500.00
Gross Profit	0.00	4,470.00	30.00	4,500.00
Expense				
Seminar Expenses				
Flyers & Postage	0.00	130.00	0.00	130.00
Meals & Snacks	0.00	0.00	100.00	100.00
Facility Rental	0.00	425.00	250.00	675.00
Speaker Costs				
Mileage Reimbursem...	0.00	340.20	12.20	352.40
Accommodations	0.00	163.98	0.00	163.98
Speaker Fees	0.00	900.00	600.00	1,500.00
Total Speaker Costs	0.00	1,404.18	612.20	2,016.38
Total Seminar Expenses	0.00	1,959.18	962.20	2,921.38
Business Expenses				
Bank Charges	9.00	85.41	0.00	94.41
Total Business Expenses	9.00	85.41	0.00	94.41
Total Expense	9.00	2,044.59	962.20	3,015.79
Net Ordinary Income	-9.00	2,425.41	-932.20	1,484.21
Net Income	-9.00	2,425.41	-932.20	1,484.21

OrSEA - Capital Chapter
Profit & Loss
October through December 2016

	11/28/16	12/10/16	General	TOTAL
Ordinary Income/Expense				
Income				
Other Types of Income				
Misc Revenue-Sale of Handouts	15.00	15.00	0.00	30.00
Total Other Types of Income	15.00	15.00	0.00	30.00
Program Income				
Program Service Fees	4,470.00	0.00	0.00	4,470.00
Total Program Income	4,470.00	0.00	0.00	4,470.00
Total Income	4,485.00	15.00	0.00	4,500.00
Gross Profit	4,485.00	15.00	0.00	4,500.00
Expense				
Seminar Expenses				
Flyers & Postage	130.00	0.00	0.00	130.00
Handouts	0.00	87.50	0.00	87.50
Meals & Snacks	0.00	136.94	0.00	136.94
Facility Rental	425.00	250.00	0.00	675.00
Speaker Costs				
Mileage Reimbursement	340.20	12.20	0.00	352.40
Accommodations	163.98	0.00	0.00	163.98
Speaker Fees	900.00	600.00	0.00	1,500.00
Total Speaker Costs	1,404.18	612.20	0.00	2,016.38
Total Seminar Expenses	1,959.18	1,086.64	0.00	3,045.82
Business Expenses				
Bank Charges	85.41	0.00	9.00	94.41
Total Business Expenses	85.41	0.00	9.00	94.41
Total Expense	2,044.59	1,086.64	9.00	3,140.23
Net Ordinary Income	2,440.41	-1,071.64	-9.00	1,359.77
Net Income	2,440.41	-1,071.64	-9.00	1,359.77

SOUTH CHAPTER REPORT

Since we did not have a meeting in May to elect officers because there was no time at last year's May Conference; we planned to have it at our class Nov.9th to elect officers, but we never got a quorum to do so then either. Therefore, we are continuing with the officers who were elected in 2015. We had a very poor turn out for this class, due to the fact we had to cancel the main speaker with short notice because of lack of registrations and high cost, plus the flu breakout with many attendees and various other reasons people didn't come. Only Sue Bladorn and 2 of her employees showed up to the Education that Maddy Gaoiran did from the IRS TAX FORUM as a Review. I did a four hour class for FREE.

We definitely need more participation in our chapter and it seems people are just so busy anymore to do so. I do want to look into a possibility with SKYPE to get everyone connected at a "virtual meeting" in the near future or some sort of "webinars" through OrSEA or NAEA. Something has got to change in the manner of our meetings to get us all into the 21st century. I do not know what the answer is, but it seems like there is a problem with people actually ATTENDING meetings in many groups, not just South Chapter is experiencing this decline in attendance!

I am hoping we can put aside an EVENING during the MAY CONFERENCE to have our Annual meeting with the SOUTH CHAPTER members who attend the Conference. Since lunchtime didn't work out so well last year. I truly feel there was too much packed into last conference and not enough time to do "Chapter" things. Portland doesn't have the same issues that the rest of the small Chapters do in getting people to attend their local chapter meetings. With South Chapter members spread out so far and wide geographically it is a huge problem for our chapter. I am open to anyone's suggestions for any solutions to this dilemma.

Furthermore, one of our South Chapter members; who you all know: Sue Bladorn is recovering from her surgery in Dec. with cancer. We would appreciate your thoughts and prayers for her continued recovery. She is a valuable member on our Board and we want her back healthy and well in May. She sent out an email to most of the board to let everyone know. If you didn't get her email; I have a copy of it for anyone that wants one.

Also, June is sick with that horrible flubug that is going around. She had it in Nov. as well and couldn't attend our class back then either. So keep her in your thoughts as well.

Sincerely,

Maddy Gaoiran, South Director and June Brock, South Director

OrSEA Membership Report

Board Meeting 1/13/17

Dear Board/Committee Members,

As of 12/31/16, the total membership count for OrSEA was 188 members strong.

In the last quarter of 2016, we had 4 new members making the count of new members in this fiscal year to 8.

I have attached a list of those that are not renewing their membership. If any of you happen to know one of these people, please give them a call and encourage them to renew.

Sincerely,

Maria Arbuckle, Membership Committee

Will be SUSPENDED January 31, 2016

Customer #	PTIN Numb	EA Number	First Name	Last Name	Addr1	Addr2	City	State Code	Postal Code	Preferred Email Address	Phone #	Membershi	Expiration Date
110083	P00168576	00038820	Sharon	Brenier	4130 SW 117th Ave # A		Beaverton	OR	97005-5606	skbrenier@gmail.com	(503) 577-9248	ACTIVE	12/31/2015
212782		00080164	William	Cappleman	1000 SW Vista Ave Apt		Portland	OR	97205-1165	wpcapp76@gmail.com	(503) 525-7321	ACTIVE	12/31/2015
212067		77596	Sheila	Howe	PO Box 803		Molalla	OR	97038-0803	sheila@molallatax.com	(503) 829-8791	ACTIVE	12/31/2015
311259	P00912734	00106297	Cynthia	Rawlinson	2915 Portland Rd		Newberg	OR	97132-1972	cyndy.rawlinson@gmail.com	(503) 487-6935	ACTIVE	12/31/2015

Will be DROPPED January 31, 2016

Customer #	PTIN Numb	EA Number	First Name	Last Name	Addr1	Addr2	City	State Code	Postal Code	Preferred Email Address	Phone #	Membershi	Expiration Date
267021	P00740211	00097076	Joseph	Alfonso	5001 Denton Dr		Lake Oswego	OR	97035-5735	joe@aegisadvisory.com	(503) 290-1089	SUSPENDED	10/31/2015
242503	P00128592	00085246	Carole	Minty	2607 Donegal St		Eugene	OR	97404-1963	cj2minty@comcast.net	(541) 344-5488	SUSPENDED	10/31/2015
306300	P00679806	94082	Robert	White	2539 NW Kings Blvd		Corvallis	OR	97330-3988	rlwii47@gmail.com	(541) 753-2933	SUSPENDED	10/31/2015

OrSEA Member List
As of January 10, 2017

First Name	Last Name	EA #	City	Preferred Email Address	Phone #	Join Date
Timothy	West	27530	Portland	westactg@aol.com	(503) 281-9378	1/1/2017
Stanley	Christiansen	99623	West Linn	Stan@ChristiansenTaxandAccounting.com	(503) 320-9572	3/31/2011
Stuart	Martin	74103	La Grande	taxman@eoni.com	(541) 963-4969	1/31/2011
Richard	Morris	71594	Beaverton	globaltradelinks@comcast.net	(503) 646-9941	2/4/2009
Tammy	Hastings	105091	Central Point	thastings@tammyhastings.com	(541) 601-8192	2/1/2016
Avery	Dorland	110346	Beaverton	avery@paulbunyantax.com	(865) 622-9697	2/1/2016
Lynn Spitaleri	Handlin	57953	Portland	lynn@shbats.com	(503) 761-9267	2/20/2002
Sheila	Howe	77596	Molalla	sheila@molallatax.com	(503) 829-8791	3/29/2004
Jane	Supnet	81617	Bend	jsupnet@allseasonstax.com	(541) 388-2550	5/7/2008
Laura	Olsen-Waggoner	117051	Klamath Falls	l.olsen@accounting-dept.com	(541) 884-2747	6/23/1998
Marcello	Innocenti	46747	Eugene	abtsinc@comcast.net	(541) 689-7071	10/9/2002
Judy	Johnson	33079	Bend	judy@baraschjohnsontax.com	(503) 348-3537	11/29/2009
Christine	Todd	71188	Tigard	taxtimeservices@comcast.net	(503) 524-3130	2/8/2012
Steven	Moore	99972	Alsea	steve@philomathtax.com	(541) 929-6060	8/4/2011
Michelle	Witt	104525	Gresham	Shelley@all-better.com	(971) 223-0581	7/16/2012
Mariette	Blay	102955	Milwaukie	mariette@blazetaxservices.com	(503) 703-3751	12/2/2012
Jennifer	O'Halloran	95031	Tualatin	goldenledgers@gmail.com	(503) 784-4487	12/7/2012
Alan	Hanawalt	96877	Portland	alan_hanawalt@yahoo.com	(503) 481-0890	5/20/2013
David	Strubhar	103078	Wilsonville	d_strubhar@smallbizpros.com	(503) 263-1411	6/4/2013
George	Boomer		Corvallis	gboom78@gmail.com	(541) 740-2945	12/1/2016
Vickie	Baker	78134	Klamath Falls	protaxsolutions@msn.com	(541) 885-2170	10/26/2011
Thomas	Avalos	91293	Central Point	avalostaxconsulting@yahoo.com	(541) 659-3703	10/16/2008
Judith	Smith	79555	Lake Oswego	jsmith@tkw.com	(971) 244-1664	11/11/2008
Jerri	Schmidt	53659	King City	jerri@yourbusinesscounts.com	(503) 601-4520	10/30/2009
Sheldon	Berger	93278	Hillsboro	shelberger1@gmail.com	(971) 227-1334	11/1/2011
Katrina	Long	79677	Sweet Home	katrina_insbookkeeping@yahoo.com	(541) 367-2877	11/15/2013
Karen	Ault	111816	Portland	karen.a@strategictax.info		11/1/2016
Javier	Correa	120926	Hillsboro	javier@ctbscorp.com	(503) 693-8208	9/18/2013
Shigeyo	Kikuchi	91211	Portland	info@ustaxmatters.com	(503) 707-4559	10/2/2008
Rebecca	Klotz	90044	Clackamas	designcorr@comcast.net	(503) 655-4775	10/9/2008
Ruth	Gunn	97274	Grants Pass	ruthe@cedarcornertax.com	(541) 479-4710	9/20/2011
Dorothy	Walsh	100097	Ashland	walsh_dorothy@hotmail.com	(541) 482-4748	9/24/2013
Mary	Linebarger	65205	The Dalles	ataxservice@gmail.com	(541) 298-2829	8/26/2011
Diane	Pallas	80216	Tigard	diane@dianeepallas.com	(503) 730-3869	8/25/2008
Scott	Hannigan	93500	Portland	srhannigan@comcast.net	(503) 720-2140	9/2/2009
Gretchen	McAbery	89618	Welches	gretchen@alpineaccounting.com	(503) 622-4384	9/15/2009
Dale	Haskin	55685	Portland	dalehaskin3@comcast.net	(503) 252-9509	9/9/2009
Connie	Fox	52928	Portland	connie@foxaccountingandtax.com	(503) 246-6994	9/13/2011
Cynthia	Lawson	67886	Tualatin	cynlawson1@msn.com	(503) 961-3417	9/13/2011
Wendy	DeMaree	106178	Grants Pass	wendy@probookstax.com	(541) 244-1886	9/4/2012
Robyn	Vina		Grants Pass	robyn@reagan.com	(541) 479-4710	8/20/2013
Melba	Carter	92124	Redmond	melba.carter@yahoo.com	(541) 923-8770	9/1/2014
John	Kramien	61685	Oregon City	jackkramien@comcast.net	(503) 631-2403	8/1/2015
Cathy	Johnson	32861	Lostine	cathy@silvercreekteam.com	(541) 569-2272	7/28/2012
Melodie	Tooley	83183	Salem	mttooley@cherrycitytax.com	503-585-4499 x 30:	8/8/2012
Justin	Botillier	95698	Medford	botillier@roguetax.com	(541) 282-3401	7/28/2011
Evelyn	Davis	109638	Portland	eveadavis@gmail.com	(503) 239-0569	7/28/2012
Patricia	Effingham	100762	Christmas Valley	peffinghamlrc@yahoo.com	(541) 576-2640	7/28/2012
Mary	Fletcher	108086	Tigard	mary@gracetaxservice.com	(503) 501-8341	7/28/2012
Carol	Wild	109011	Portland	carol@aetaxservice.com	(503) 228-0962	7/28/2012
Michael	Imlah		Beaverton	imlah@easystreet.net	(503) 332-0938	8/1/2016
Bradley	Bemis		Redmond	bwasbradley@gmail.com	(541) 508-8511	8/1/2016
Audra	Bemis		Redmond	ambms@gmail.com	(541) 508-8659	8/1/2016

OrSEA Member List

As of January 10, 2017

First Name	Last Name	EA #	City	Preferred Email Address	Phone #	Join Date
Susie	Gregory	31388	Roseburg	susieg49@gmail.com	(541) 673-1247	6/1/1983
Bonnie	Gatlin	36786	Lincoln City	bgatlinea@aol.com	(541) 996-8037	1/6/1986
Janet	Dotson	39000	Eugene	janetdot@aol.com	(541) 343-6502	6/29/2009
Raymond	Meyer	09533	Portland	ray@meyerbookkeeping.com	(503) 253-1178	6/9/1987
Beverly	Stone	43314	Wood Village	bevstone2@comcast.net	(503) 665-2540	9/21/1988
Marilyn	Johnston	27008	Central Point	mts1040@hotmail.com	(503) 664-3363	12/22/1989
Kurt	Williams	48065	Aurora	Kurt@cornerstonetax1040.com	(503) 678-5765	3/30/1990
Jeanne	Taylor	48322	Keno	jegage@jegage.com	(541) 273-8593	4/6/1990
Judith	Krussow	35726	Corbett	krussow@aol.com	(503) 313-9722	5/11/1990
Susan	Bladorn	33138	Roseburg	rosetst@rosenet.net	(541) 672-4317	5/11/1990
Joseph	Alexander	35596	Tigard	wvbsbbs@aol.com	(503) 639-2165	8/31/1990
David	Hummel	32733	Portland	drhummel@comcast.net	(503) 292-2186	5/23/1991
Edwin	McMains	49784	Aloha	emcmains@earthlink.net	(503) 848-7711	8/26/1991
Carol	Jonasson	51601	Eugene	carol@jonassonandcompany.com	(541) 341-4673	6/26/1992
Mary	Lunceford	51798	Molalla	mfb@molalla.net	(503) 829-2058	9/16/1992
Aleta	Johnston	51600	Boring	dera@teleport.com	(503) 663-3308	10/1/1992
Carol	Brooks	46040	Jacksonville	urtaxlady@rvi.net	(541) 773-2717	11/10/1992
Gary	Gaska	12252	Gresham	garygaska@aol.com	(503) 666-7100	8/2/1993
Carol	Smith	53138	Silverton	carolsbkpg@aol.com	(503) 873-6125	8/10/1993
Michael	Davidson	55878	Portland	michael@aetaxservice.com	(503) 228-0962	1/14/1994
Marilyn	Irving	55606	Grants Pass	taxlady415@hotmail.com	(541) 479-1780	10/19/1994
Toni	Litzer	51654	Portland	litzer@comcast.net	(503) 761-0038	10/19/1999
Daniel	Klauda	52654	Winston	tax@taxstrategiesinc.com	(541) 679-8188	11/8/1995
Helen	Pilgrim	52925	Portland	helentax@pilgrimaccounting.com	(503) 781-6579	11/19/1998
Catherine	Giovinco	54288	Mapleton	asc5@qwestoffice.net	(541) 268-0108	10/26/1995
Douglas	Snyder	57828	Portland	doug@snyderfosterpcpas.com	(503) 297-2610	3/22/1995
Hyong	Yu	58972	Portland	hjt看service@aol.com	(503) 235-2714	9/11/1995
R.	Voigt	59043	Grants Pass	rsvoigt@charter.net	(541) 471-8075	11/27/1995
Linda	Blevins	44046	Lake Oswego	linda@willamettetax.com	(503) 777-2727	6/17/1996
Michael	Cord	33937	Bend	cord.jim@gmail.com	(510) 841-1301	2/13/1997
Nancy	Sabin	61571	Medford	taxladynancy1@aol.com	(541) 282-5915	10/29/1996
Heidemarie	Zepf	00061597	Klamath Falls	heidizepf@yahoo.com	(310) 789-5207	9/17/1996
David	Purkey	61570	Beaverton	dpurkey@pnncl.com	(503) 614-8077	3/18/1996
Monica	Scroup	61573	Warrenton	monica@marxenandhall.com	(503) 861-3383	3/18/1996
Barbara	Craven	59569	Salem	barb@barbsbookandtax.com	(503) 399-0017	4/23/1996
Michael	Carpenter	58648	Portland	mike@carpenterstax.com	(503) 232-6137	12/10/1999
Michael	Addington	62542	Bend	notaxman@qwestoffice.net	(541) 389-1343	10/24/1997
Peter	Mar	63206	Alvadore	peter@helpmytaxes.com	(541) 607-9200	6/23/1998
Joseph	Anthony	65865	Portland	joe@joethetaxguy.com	(503) 281-2264	12/21/2000
Dale	Marino	65613	Portland	d.c.marino@comcast.net	(503) 239-4716	2/10/2003
June	Brock	64923	Central Point	jbrock9092@brtax.net	(541) 664-3018	5/11/1998
Jack	Griffin	67584	Lake Oswego	jack@griffitax.net	(503) 697-6540	1/20/1999
Marie	Linders	72860	Klamath Falls	marie.linders@jmsolutionsllc.com	(541) 884-8822	6/1/1999
Russell	Ward	67762	Newberg	russsward@onlinenw.com	(503) 704-2659	2/4/2000
Shirley-Marie	Raven	69878	Cottage Grove	smraven@aol.com	(541) 767-0042	5/31/2000
Debra	Oglesby	72737	Troutdale	dogl@1040.com	(503) 666-6223	6/1/2000
Melinda	Holberton	69952	Portland	holbertontaxservice@comcast.net	(503) 805-9216	6/1/2000
Virginia	Bowles	59250	Milton Freewater	virginia@vbowles.com	(541) 938-3077	1/3/2001
Ira	Rosenberg	71169	Gresham	iratax@frontier.com	(503) 661-6406	3/28/2001
Charlene	Van Cleef	27157	Beaverton	cvancleef@comcast.net	(503) 646-6582	6/21/2001
Barbara	Carpenter	74349	Portland	barbara@carpenterstax.com	(503) 232-6137	5/3/2002
Carol	Mulder	72438	Corvallis	mulderctax@yahoo.com	(541) 430-2027	12/13/2001
Donna	Hines	73580	Bend	donna@bkptaxservice.com	(541) 388-9882	4/11/2002

OrSEA Member List
As of January 10, 2017

First Name	Last Name	EA #	City	Preferred Email Address	Phone #	Join Date
Carla	Pentkowski	46105	Portland	carla@countyside5555.com	(503) 647-5279	8/29/2002
Laurie	Wright	73116	Reedsport	parksidetax@mycomspan.com	(541) 271-3249	10/2/2002
Denise	Bean	73341	Springfield	denise@beancountertax.com	(541) 726-0908	11/22/2002
Ronald	Giebenhain	74696	Newberg	ron@giebenhain.com	(503) 538-5005	2/27/2003
John	Davis	77922	Canby	pdxtim@hotmail.com	(503) 319-6880	3/22/2004
Roberta	Kinohi	53688	Portland	rgk@rgkinc.com	(503) 246-9992	7/30/2004
Bill	McCracken	81163	Oregon City	mrbill@mrbilltaxman.com	(503) 656-0699	10/25/2004
Nicole	Piehl	78837	Eugene	nicole@kentandersonlaw.com	(541) 683-5100	11/8/2004
Michelle	Rasmussen	81520	Canby	jandmaccounting@yahoo.com	(503) 263-4705	2/28/2005
Catherine	Baker	78543	Albany	cathybtax@hotmail.com	(541) 926-7982	4/28/2005
Madilyn	Gaoiran	78358	North Bend	bnoltax@epuerto.net	(541) 756-2929	6/20/2005
James	Elliott	82267	La Pine	taxman1666@gmail.com	(541) 536-1153	7/8/2005
Kenneth	Osterman	82246	Tigard	ken@tigardtax.com	(503) 639-2200	9/16/2005
Tammy	Arnado	82987	Bend	tammy@taxnbooks.com	(541) 389-4535	8/2/2006
Joyce	Davis	82903	Bend	shoobox@bendbroadband.com	(541) 383-4125	4/10/2006
Kirkwood	Donavin	82928	Springfield	donavin@mail.com	(541) 485-8581	6/29/2006
Antonia	Estes	83832	Lakeview	jejei.logik@gmail.com	(541) 947-3636	6/2/2006
Cletus	Fernandez	84345	Salem	cletusfernandez7135@msn.com	(503) 588-0498	5/14/2008
Stanley	Gresick	85173	Corvallis	stan.gresick@gresicktax.com	(541) 752-4239	8/18/2006
L.	Hamilton	83375	Eugene	blaneandjan@comcast.net	(541) 344-8299	5/17/2006
Brent	Hamilton	84869	Lake Oswego	brent@wbhfinancialservices.com	(503) 699-9200	3/1/2006
William	Price	84439	Bend	will@wpricetax.com	(503) 525-2985	6/23/2006
Louis	Roner	84341	Cottage Grove	louis@taxserviceplus.net	(541) 942-8237	6/23/2006
Beverly	Sudduth	83344	Roseburg	bsudduth@embertsoncpa.com	(541) 672-3797	5/3/2006
Diana	Day-Murphy	81677	Bend	diana@d-mtaxandaccounting.com	(541) 388-8832	6/16/2006
Florence	Lasswell	26460	Corvallis	lasswell@teleport.com	(541) 753-4009	8/7/2006
Susan	High	75540	Gladstone	shigh@clackatax.com	(503) 655-3737	9/21/2006
Jay	Orand	87843	Hood River	jaorand@gmail.com		8/1/2007
Joyce	Kanoff	51606	Albany	joyce.kanoff@hrblock.com	(541) 928-6432	9/13/2007
Russell	Shaver	88985	Boring	russ@tctslc.com	(503) 558-9220	11/16/2007
David	Harmsen	67878	Portland	david@pcapdx.com	(503) 238-0621	1/24/2008
Susan	Girouard	34268	Salem	susieg1040@gmail.com	(503) 399-1778	2/11/2008
Daniel	Stearns	90094	Canby	danielstearns@live.com	(503) 428-1591	5/22/2008
Rex	Howe	29488	Clackamas	rexhowe@earthlink.net	(503) 698-7513	7/2/2012
Cynthia	Reeves	81340	Westport	creeves355@gmail.com	(503) 455-9201	7/1/2014
Jean	Andrews		Salem	jean@jeanandrewstax.com	(503) 856-1041	7/1/2016
Myron	Pasichny	123261	Beaverton	sd7496@gmail.com	(619) 871-5789	7/1/2016
Richard	Davey	41271	Gresham	rick@taxfinsol.com	(503) 666-7909	1/26/2012
Emerice	Stettiner	53093	Hillsboro	lzstea@comcast.net	(650) 433-5497	6/8/1993
Irene	Gresick	89028	Corvallis	igresick@comcast.net	(541) 752-4239	10/8/2008
Maria	Arbuckle	87840	Salem	marbuckle87840@gmail.com	(503) 485-1983	5/25/2011
Krista	Haas	101627	Central Point	taxbuck@yahoo.com	(541) 772-6530	5/19/2010
Yvonne	Schwartz	84228	Oregon City	comprehensivetx@aol.com	(503) 657-2550	6/13/2012
Melody	McKenzie	00101901	Lincoln City	taxes@graycoast.com	(541) 359-3660	6/6/2012
Jeffrey	Linders	00098710	Klamath Falls	jeff.linders@jmsolutionsllc.com	(541) 884-8822	6/13/2012
Windy	Alarie	00113696	Grants Pass	wabkping@gmail.com	(541) 476-5548	6/1/2014
Suabyi	Yang		Gresham	suabyi@gmail.com		6/1/2016
Jean	Robins	49366	Portland	jmrobins@augustgroup.us	(971) 302-7943	4/29/2009
LaVerne	Lewis	95045	Gresham	cronemagic@aol.com	(503) 674-2574	3/4/2010
Peggy	Minter	89015	Wood Village	peggyminter@comcast.net	(503) 661-6456	5/3/2010
Rebecca	McAllister	99349	Portland	rebecca@aetaxservice.com	(503) 228-0962	4/21/2011
Robert	Merriam	63091	Bandon		(541) 347-7166	5/3/2012
Lorie	Easlick	102262	Eagle Point	lslick@yahoo.com	(541) 826-9882	5/1/2014

OrSEA Member List

As of January 10, 2017

First Name	Last Name	EA #	City	Preferred Email Address	Phone #	Join Date
Diane	Phelan	99319	Woodburn	Twinnmom111@yahoo.com	(503) 982-0346	5/1/2014
Debra	Howard	115848	Albany	DEBRA541@COMCAST.NET	(541) 981-2050	5/1/2015
Deborah	Arntz	118271	Burns	darntz@opgcpa.com	(541) 573-6151	5/1/2015
William	Harshbarger	113720	Nehalem	harshbarger@nehalem.tel.net	(503) 368-6716	5/1/2016
Cher	Fillman	54892	Forest Grove	eaglewomancher74@outlook.com	(503) 357-4934	1/24/1994
Stacy	Collins	91182	Bend	stacycollins69@gmail.com	(541) 788-4303	3/17/2011
Katie	Parker	106367	Eugene	katie@allabouttaxespc.com	(541) 686-9223	3/21/2013
Tamsyn	Campbell	112822	Corvallis	tamsyn@hasslefreecashflowinvesting.com	(707) 980-0845	4/1/2014
Sheila	Johnson	111798	Ashland	sheilaj1040@gmail.com	(541) 488-3352	4/1/2014
Angela	Garcia	122051	Molalla	angela@amgaccountingsolutions.com	(503) 804-7557	4/1/2016
Donald	Thorn	121467	Creswell	donthorn@centurytel.net	(541) 895-3239	4/1/2016
Colleen	Mincinski	121141	Corvallis	cmincinski@comcast.net	(541) 760-7025	4/1/2016
Eileen	Hines	41555	Portland	slifman@juno.com	(503) 297-1460	2/26/2013
Rhoda	Ihander	84773	Astoria	atc@seasurf.net	(503) 325-8297	7/19/2006
Wade	Jacque	83537	Clackamas	wade_jacque@yahoo.com	(503) 557-8228	1/21/2011
Cindy	Petersen	61691	Bend	cindypeterseneaa@bendbroadband.com	(541) 419-7346	1/28/2011
Deborah	Brown	78349	West Linn	debby@allproaccounting.com	(503) 680-4080	2/3/2012
James	Keep	32376	Portland	jim@jameskeep.com	(503) 777-3353	1/30/2012
Linda	Santee	92614	Portland	lmsanteetax@gmail.com	(503) 421-6265	2/1/2015
Holly	Kjeldsen	116193	Gresham	petersontaxservice@gmail.com	(503) 666-3224	2/1/2015
Gabrielle	Josephson	111899	Portland	gabrielle@artemistax.com	(503) 482-9503	2/1/2016
Vicki	Coscia		Roseburg	vickicoscia@yahoo.com	(541) 672-4317	2/1/2016
Sharon	Brenier	38820	Beaverton	skbrenier@gmail.com	(503) 577-9248	12/27/2008
Cynthia	Rawlinson	106297	Newberg	cyndy.rawlinson@gmail.com	(503) 487-6935	12/19/2012
Erin	Strozyk	117203	Portland	erins1@hotmail.com	(253) 709-8740	1/1/2016
Robert	Brown	90892	Fairview	rbrown@thetaxplace.net	(503) 674-8844	2/20/2009
Patrick	Hurley	28076	Medford	pat@hurleystax.com	(541) 774-1040	5/9/2003
Kelvin	Brown	41151	Fairview	kbrown@thetaxplace.net	(503) 674-8844	12/22/2004
James	Coplin	50422	Salem	jac@jacoplin.com	(503) 363-3786	1/4/1993

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OrSEA Spring Conference @ Wilesonville Or

	Projected #	Actual #	Projected Cost			Inclusive \$67 per day
			Each			
MONDAY:						
Room Charge	1		350			
Board Lunch	20		15.5	310		
Service Charge			20%	62	\$722	\$722
Monday Total	25		0			
TUESDAY:						
Room Charge	1		200	200		
Set Up Charges	60		1.5	90		
Morning buffet	60		18	1080		
Morning break - coffee	2		38	76		
Lunch	60		23	1380		
Afternoon break - coffee	60		4.75	285		
Service Charge			20%	622.2	\$3,733	\$62.22
Tuesday Total						4020
WEDNESDAY:						
Room Charge	1		200	200		
Set Up Charges	60		1.5	90		
Morning buffet	60		18	1080		
Morning break - coffee	2		38	76		
Lunch	60		26	1560		
Afternoon break - coffee	60		4.75	285		
Banquet	60		30.69	1841.4		2520
Service Charge			20%	1026.48	\$6,159	\$65.82
Wednesday Total						4020
THURSDAY:						
Room Charge	1		200	200		
Set Up Charges	60		1.5	90		
Morning buffet	60		18	1080		
Morning break - coffee	2		38	76		
Lunch	60		27	1620		
Service Charge			20%	613.2	\$3,679	\$61.32
Thursday Total						4020
Total Room and Meal Charges				\$14,293		\$15,302

Speaker Room Charges:

Alan Pinkney	2	130	260		
Travis Greaves	2	130	260		
Jeff Wong	0	130	0	\$520	\$520

Speaker Speaking Fees:

Alan Pinkney	8	250	2000		
Travis Greaves	7	250	1750		
Jeff Wong	7	250	1750	\$5,500	\$5,500

Speaker Travel	1	1,500	1500	\$1,500	\$1,500
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Speaker Materials/Copies	1	1,500	1500	\$1,500	\$1,500
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Total Speaker Charges				\$9,020	\$9,020
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Speaker Gifts	3	56.33	168.99	\$169	\$169
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Sound system

Labels

Binders	60	3	180	\$180	\$180
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Paper

Bag Stuffers

Dbl Tickets

Candy

Raffle Prizes

Other Supplies	1	100	100	\$100	\$100
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Banquet Entertainment

Lanyards & Badges	1	84	84	\$84	\$84
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Mailing Costs	1	18	18	\$18	\$18
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Total Other Charges				\$551	\$551
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TOTAL CHARGES FOR CONFERENCE				\$23,864	\$24,873
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TOTAL INCOME FOR CONFERENC	60	400	24000	\$24,000	\$24,000
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Net Profit(Loss)					-\$873
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Discount

Projected attendees		60			
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2016 - 2017 ORSEA SLATE OF NOMINEES

July 22nd 2016

Marie Linders, NOMINATING COMMITTEE CHAIR

Following is the slate of ORSEA Officer and Director Nominees with prospective initial election, maximum term(s), re-election date, and mandatory term end.

Officers	Nominee	Initial Election	Maximum Term	Re-Election Date	Mandatory Ending Date
President	Kirkwood Donavin	May 2015	(2) one-year terms	May 2016	June 2017
Vice President	Daniel Stearns	May 2015	(2) one-year terms	May 2016	June 2017
Secretary	Barbara Craven	May 2017	(4) one-year terms	May 2017	June 2021
Treasurer	Ira Rosenberg	May 2015	(4) one-year terms	May 2016	June 2019
Immediate Past President	Marie Linders				
Directors	Nominee	Initial Election	Maximum Term	Re-Election Date	Mandatory Ending Date
North Director	Rebecca McAllister	May <u>2016</u>	(2) two-year terms	May 2018	June 2020 *** NEW
North Director	Evelyn Davis <small>(finish Cyndy Rawlinson term)</small>	May 2013 <u>2015</u>	(2) two-year terms	May 2015 <u>2017</u>	June 2017 <u>2019</u> *** NEW
Central Director – West	Cletus Fernandez	May 2014	(2) two-year terms	May 2016	June 2018 ☺
Central Director – East	Cindy Petersen	May 2013	(2) two-years terms	May 2015	June 2019 ☺
South Director	June Brock	May <u>2016</u>	(2) two-year terms	May 2018	June 2020 ***NEW
South Director	Maddie Gaoiran	May 2013	(2) two-year terms	May 2015	June 2017
At-Large Director *	Carol Mulder	May 2014	(2) two-year terms	May 2016	June 2018

(BOLD) Indicate pending new election or re-election for Fiscal Year July 1 to June 30

2016 - 2017 Board of Directors and Committee Contacts

Office	Name	Primary Email	Work Phone	Home Phone	Cell Phone
President	Kirkwood Donavin	donavin@mail.com	<u>541-726-0908</u> 5778 Mica St Springfield, OR 97478	<u>541-485-8581</u>	<u>541-990-5758</u>
Vice President	Daniel Stearns	danielstearns@live.com	<u>503-428-1591</u> 181 N Grant St STE 101 Canby, OR 97013		<u>971-600-8882</u>
Secretary	Jeffrey Linders	jeff.linders@jmsolutionsllc.com	<u>541-884-8822</u> 513 Main St STE 101 Klamath Falls, OR 97601		<u>541-891-2756</u>
Treasurer	Ira Rosenberg	iratax@frontier.com	<u>562-533-4075</u> 530 NW Battaglia Ave Gresham, OR 97030		
Past President	Marie Linders	marie.linders@jmsolutionsllc.com	<u>541-884-8822</u> 513 Main St STE 101 Klamath Falls, OR 97601		<u>541-892-1560</u>
North Director	Rebecca McAllister	Rebecca@aetaxservice.com	<u>503-228-0962</u> 610 SW Alder St. Ste 410 Portland, OR. 97205		
North Director	Eve Davis	eve@inorouttax.com	<u>503-239-0659</u> 3828 SE Division St Portland, OR 97202		
Central West	Cletus Fernandez	cletusfernandez7135@msn.com	<u>503-588-0498</u> 2550 Market St. NE Salem, OR. 97301		
Central East	Cindy Peterson	tcpete@bendbroadband.com	<u>541-419-7346</u> 20240 Mountain View Dr. Bend, OR. 97701		
South Director	June M Brock	jbrock9092@ccountry.net	<u>541-664-3018</u> 414 E. Pine St. Central Point, OR 97502	<u>541-664-6883</u>	<u>541-840-0276</u>
South Director	Maddy Gaoiran	bnottaxt@epuerto.net	<u>541-756-2929</u> 1934 Newmark St Ste A North Bend, OR 97459		
At-Large Director	Carol Mulder	mulderctax@yahoo.com	<u>541-430-2027</u> 761 NW Harrison Blvd. Corvallis, OR. 97330		

2016 - 2017 Board of Directors and Committee Contacts

Office	Name	Primary Email	Work Phone	Home Phone	Cell Phone
Committees					
Audit	??				
By Laws	Caty Giovinco	asc5@qwestoffice.net	<u>541-268-0108</u> PO Box 125 10692 Highway 126 Ste 4 Mapleton, OR 97453		
	Sue Bladorn	roset@rosenet.net	<u>541-672-4317</u> 631 SE Rose St Roseberg, OR 97470		
	Marie Linders	marie.linders@jmsolutionsllc.com	<u>541-884-8822</u> 513 Main St STE 101 Klamath Falls, OR 97601		<u>541-892-1560</u>
Communications/Website	Ira Rosenberg	iratax@frontier.com	<u>562-533-4075</u> 530 NW Battaglia Ave Gresham, OR 97030		
Conferences					
2016 Mount Bachelor	Barbara Craven	barb@barbsbookandtax.com	<u>503-339-0017</u> 2659 Commercial St SE Ste 202 Salem, OR. 97302		
2017 Portland	Ira Rosenberg	iratax@frontier.com	<u>562-533-4075</u> 530 NW Battaglia Ave Gresham, OR 97030		
2018 Eugene	Maria Arbuckle	marbuckle87840@gmail.com	<u>503-485-1983</u> 875 Idylwood Dr SE Salem, OR. 97302		
	Kirkwood Donavin	donavin@mail.com	<u>541-726-0908</u> 5778 Mica St Springfield, OR 97478	<u>541-485-8581</u>	<u>541-990-5758</u>
2019 TBD	??				

2016 - 2017 Board of Directors and Committee Contacts

Office	Name	Primary Email	Work Phone	Home Phone	Cell Phone
Education	June M Brock	jbrock9092@ccountry.net	<u>541-664-3018</u> 414 E. Pine St. Central Point, OR 97502	<u>541-664-6883</u>	<u>541-840-0276</u>
	Marie Linders	marie.linders@jmsolutionsllc.com	<u>541-884-8822</u> 513 Main St STE 101 Klamath Falls, OR 97601		<u>541-892-1560</u>
Finance and Budget	Daniel Stearns	danielstearns@live.com	<u>503-428-1591</u> 181 N Grant St STE 101 Canby, OR 97013		<u>971-600-8882</u>
Government Relations					
IRS	Michael Davidson	michael@aetaxservice.com	503-228-0962 610 SW Alder St Ste 410 Portland, OR 97205		
DOR	Cletus Fernandez	cletusfernandez7135@msn.com	<u>503-588-0498</u> 2550 Market St. NE Salem, OR. 97301		
Tax Board	Barbara Craven	barb@barbsbookandtax.com	<u>503-339-0017</u> 2659 Commercial St SE Ste 202 Salem, OR. 97302		
Historian	Sue Bladorn	roset@rosenet.net	<u>541-672-4317</u> 631 SE Rose St Roseberg, OR 97470		
Legislative	Daniel Stearns	danielstearns@live.com	<u>503-428-1591</u> 181 N Grant St STE 101 Canby, OR 97013		<u>971-600-8882</u>
	Ira Rosenberg	iratax@frontier.com	<u>562-533-4075</u> 530 NW Battaglia Ave Gresham, OR 97030		
Media/Public Relations	Cletus Fernandez	cletusfernandez7135@msn.com	<u>503-588-0498</u> 2550 Market St. NE Salem, OR. 97301		
Ethics	Marie Linders	marie.linders@jmsolutionsllc.com	<u>541-884-8822</u> 513 Main St STE 101 Klamath Falls, OR 97601		<u>541-892-1560</u>

2016 - 2017 Board of Directors and Committee Contacts

Office	Name	Primary Email	Work Phone	Home Phone	Cell Phone
Membership	Maria Arbuckle	marbuckle87840@gmail.com	<u>503-485-1983</u> 875 Idylwood Dr SE Salem, OR. 97302		
	Marie Linders	marie.linders@jmsolutionsllc.com	<u>541-884-8822</u> 513 Main St STE 101 Klamath Falls, OR 97601		<u>541-892-1560</u>
Policies & Procedures	Caty Giovinco	asc5@qwestoffice.net	<u>541-268-0108</u> PO Box 125 10692 Highway 126 Ste 4 Mapleton, OR 97453		
	Sue Bladorn	roset@rosenet.net	<u>541-672-4317</u> 631 SE Rose St Roseberg, OR 97470		
Scholarships/Awards	June M Brock	jbrock9092@ccountry.net	<u>541-664-3018</u> 414 E. Pine St. Central Point, OR 97502	<u>541-664-6883</u>	<u>541-840-0276</u>
	Marie Linders	marie.linders@jmsolutionsllc.com	<u>541-884-8822</u> 513 Main St STE 101 Klamath Falls, OR 97601		<u>541-892-1560</u>
Strategic Planning	??				

President's Report

1. As of the December 5th affiliate call NAEA has 10,739 members and associates which is 160 more members than the same time last year. There are 1,188 new members and associates over the last 12 months. The 1,188 new members and associates is due in large part to Affiliate support of the membership recruiting initiative. NAEA staff has been sending exit surveys to members who do not renew and this information shows that the largest number of non-renewing members is because of retirement or leaving the tax business.
2. Educate America Update at the affiliate call. The Educate America Booth is available for Job/Career Fair events during the year. Gigi Jarvis is the booth coordinator The booth will ship to you with the "No Lines No Borders" flyer and the academic associate membership application and some new mechanical pencils which have the Educate America Logo on them. A presentation "Careers as an EA is available for these job fairs. There is a Facebook page set up the EA designation as a career opportunity.
3. Government Relations Update from former GR Director Bob Kerr. The IRS has issued proposed regulation that would raise the fee for taking the 3-part special enrollment examination from \$11 (\$33 for all three parts) to \$81 per part or \$243 for all three. This represents a decline from the original fee increase of from \$99 per part or \$297 for all three parts. Also IRS e-Services enhanced two factor long in has been postponed from October 24 to a date in early 2017. Anyone using e-services must validate their identity by setting up their own personal GET TRANSCRIPT account or wait for the IRS e-services switch to be thrown which will require every e-services user to validate their identity with e-services support (about 220,000 users).
4. Patti Kappen is on the NAEA Board of Directors and the Membership Committee. I reported back to Patti that there was little enthusiasm for making cold phone calls to non-members. Patti says that the membership committee would like us to contact all new enrolled agents and not ask them to join NAEA but to establish a "relationship" with them as a person that they can call on for information.
5. Beth Logan, EA has created an index of all the major articles in the NAEA Journal since 2011. After you log into NAEA, visit the following URL, to see this valuable resource:
<http://www.naea.org/sites/default/files/u24809/EA-Journal-index.pdf>.
6. Sai Sraddha Chedemala of the Intuit ProConnect Group is interested in advertising at our web site and also possibly doing something at next years conference. I told her that since I we would be having a board meeting this month that I would discuss with the board at that time.
7. Do we want to have the Governor issue another proclamation for "Enrolled Agent Week?"

Kirkwood Donavin
OrSEA President