OREGON SOCIETY OF ENROLLED AGENTS BOARD OF DIRECTORS' MEETING MINUTES Monday May 22, 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
- 3. OrSEA Mission Statement Jeffrey Linders read the OrSEA Mission statement
- 4. Roll Call; Proxies for absent Board Members Jeffrey Linders performed roll call by passing a sign in sheet, a proxy was received for Cletus Fernandez.
- 5. Agenda; Revisions and time frames Kirkwood Donavin asked for revisions, Dan noted his guest speaker would be coming in at 1pm.
- 6. Review/Approve January 2017 Meeting Minutes(Posted on web site) Jeffrey Linders presented the minutes for the January meeting, Michael Davidson moved to accept the minutes as presented, Maddy Gaoiran seconded, the minutes passed without dissent.
- 7. Vice President's Report Daniel Stearns noted that the law suit was ruled in our favor and that the Board opted to appeal to the Oregon Supreme Court. This would not necessarily close the case if the Supreme Court ruled in the Boards favor it would merely send it back to the lower court. We are asking for court fees to be covered. If we receive a "court fee" ruling we will reimburse NAEA a portion of that. Dan also touched on the "Oregon Taxpayer Bill of Rights" discussed contacting legislators with regard to the EA roll regarding representation as tax professionals. June 6 8:30 in Salem will be the legislative "fly in". Kirk commented about the value of Ted (or lobbyist) and how he relates to the legislators and the value to EA's being associated with the "Taxpayer Bill of Rights".
- 8. Treasurer's Report Ira Rosenberg presented the Balance sheet, P&L Budget vs. Actual and the Projected costs of the Conference. Conference is projected to lose between \$3,000 and \$3,500; attendance at the conference has been down over the past 3 years. Between the lobbyist, legal fees and conference losses we have had to offset by pulling from our reserves. Financially OrSEA is not performing well.
- 9. Director's Reports/Chapter Reports

- a. North Directors—Rebecca McAllister/Eva Davis no report submitted (returned from DC fly-in) met with legislators, main points included tax reform, IRS reform.
- b. Central Directors—East Cindy Petersen submitted a report (attached)
 West Cletus Fernandez not present, submitted balance sheet and P&L (attached)
 Education is scheduled for June or August per Maria.
- c. South Directors—Madilyn Gaoiran/June Brock submitted a report (attached)
 The November class and meeting were canceled due to poor attendance.
 Meeting in May (at conference).
- d. At-Large Director—Carol Mulder nothing to report

10. Committee Reports

- a. Membership—Maria Arbuckle submitted a report and membership list (attached)
 195 in membership which is up.
- b. Media/Public Relations—Cletus Fernandez not present no report submitted
- c. Scholarships/Awards—June Brock submitted a report (attached) Presidents award will be presented, June will discuss the qualifications for the Founders and Lifetime Achievement Awards at the general meeting.
 - i. NTPI Scholarship for online course, a request was made regarding the
 use of the scholarship for the online course, discussion ensued.
 Consensus was that the scholarship should default to someone who is
 attending live, then to the online participant.
- d. Historian—Sue Bladorn submitted a report (attached) highlighted books and photos going back to 1990.
- e. Annual Conventions
 - i. 2017— Ira Rosenberg Portland everything on track.
 - ii. 2018 Kirkwood Donavin Springfield facility is booked.
 - iii. 2019 Ashland June Brock submitted a report (attached) contacted Ashland Springs and will go over with Ira. She does have other options depending on cost limitations. There was a discussion regarding moving the date of the conference. Caty suggested the 3rd week in June.
- f. Education Committee—June Brock submitted a report (attached) reviewed current education all is on track. Taking requests for speakers and topics.

- g. Communications/Website Committee Report—Ira Rosenberg no report submitted
- h. Legislative Committee Danial Stearns
 - i. Sara Lara-Director of Low Income Tax Office Portland is looking to form a partnership with OrSEA as potential volunteers, or references. Dan will obtain a copy of the power point and forward it via email. They handle all aspects of the tax code for lower income clients, W-2 issues and also preparer fraud. Limited to less than 250% of poverty level max in most cases. Pro-bono work may be tailored to specific areas and do not mean it is an all or nothing (grant is limited to non fee referral). Contact for Sarah with Legal Aide Service sarah.lora@lasoregon.org.
 - ii. Fly-in Day June 6th in Salem to meet with legislators, highlight Taxpayer
 Bill of Rights and EA issues.
- i. Ethics Violations Marie Linders nothing to report
- j. Communications/Website Ira Rosenberg no report submitted
- k. Government Relations
 - i. IRS Michael Davidson reported they are moving toward correspondence audits. Forum is scheduled for October
 - ii. DOR Cletus Fernandez not present no report submitted
 - iii. Tax Board Barbara Craven reported the Tax Board is changing their attitude toward the preparer's exam.
- By Laws Caty Giovinco no changes have been made or requested
- m. Nominating Committee Marie Linders noted Maddy Gaoiran volunteered to be the incoming Vice President and Marie will be the incoming Co South Director
- n. Finance & Budget Ira Rosenberg nothing more to report from Treasurer's report
- o. Policies & Procedures Sue Bladorn submitted a report along with the updated "Annual Conference" P&P (attached)
- p. Strategic Planning nothing to report
- 11. President's Report Kirk noted he will not be at the general meeting and Dan will be handling it. Peter Mar will be swearing in the new officers as there was no national

- representative available. Was contacted by a company requesting a spot on our website similar to the arrangement we had with Gliem.
- 12. New and/or Pending Business no new business was noted
- 13. Good of the Order
- 14. Adjourn Maddy moved that the meeting be adjourned; Dan seconded the motion passed without dissent.
- Motions: 1. Michael Davidson moved to accept the minutes as presented, Maddy Gaoiran seconded, the minutes passed without dissent.

Action Items: 1. Dan will obtain a copy of the Legal Aide Service power point and forward it via email.

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.

OSSEA Board Meeting Poll Call 05, 22, 17 Name Signature Titte New a Gus Past Pres mane linders Veres, Daniel Stearns Kiskwood Donavin MO BIDENT Rebecca McAllisky Charles MicHAEL DAVIDER at longe North Diretou 183 REP Raby Committee Welly Davian South Dir. BARBARA & CRAVEN Evelyn Davis Madiryn Gaoiran IRA ROSEMBEN TREBUTE Cinds Refersen DIRECTORS Degrovines By-LAWS

JULIER SOUTH Joyce Davis CATHERIOL GIOVINES Maria Arbuches dreinbuship, South Dir June Brown Pot P Committee (Susan Bladom Busan Blodon Star Linders Sec - + + **▲** ▼ **④** jump to position playback speed

Jeff Linders

From:

CLETUS FERNANDEZ [cletusfernandez7135@msn.com]

Sent:

Saturday, May 13, 2017 11:14 PM

To:

Kirkwood Donavin; Daniel Stearns; irataxfrontier.com; marie.linders(msolutionsllc.com; Jeff

Linders: Rebecca McAllister: Eye Davis: Cindy Petersen: June Brock: bnottaxt@epuerto.org: mulderctax@yahoo.com; Caty Giovinco; Susan Bladorn; Barb Craven; Maria Arbuckle;

michael@aetaxservice.com

Subject:

Re: OrSEA Agenda

Hi Kirk.

I will be out of country during the meeting and the the conference. I am sending my Proxy to Jeff Linders for voting.

Thanks

Cletus

MEMBER VOTING PROXY

To: Oregon Society of Enrolled Agents

State of Oregon

General Powers

I, the undersigned Active Member of the Oregon Society of Enrolled Agents, hereby appoint Jeff Linders, the secretary of the Society, as nominee, and proxy with powers of substitution for and in the name and place of the undersigned, to appear, represent and cast votes on any matters to come before the Quarterly Meeting of the members of the Oregon Society of Enrolled Agents, to be held in Wilsonville, Oregon on May 22, 2015, and at any adjournment or adjournments thereof. This proxy shall be void if I personally attend the meeting. IN WITNESS WHEREOF, I have executed this proxy on May 13, 2015.

Cletus Fernandez

Central Director-ORSEA

503-588-0498

From: Kirkwood Donavin < donavin@mail.com >

Sent: Thursday, May 11, 2017 1:14 PM

To: Daniel Stearns; irataxfrontier.com; marie.lindersjmsolutionsllc.com; Jeff Linders; Rebecca McAllister; Eve Davis; cletusfernandez7135@msn.com; Cindy Petersen; June Brock; bnottaxt@epuerto.org; mulderctax@yahoo.com; Caty

Giovinco; Susan Bladorn; Barb Craven; Maria Arbuckle; michael@aetaxservice.com

Subject: OrSEA Agenda

FYI

OREGON SOCIETY OF ENROLLED AGENTS BOARD OF DIRECTORS' MEETING

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- 2. Welcome Board Members, Committee Chairs and Guests
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- 5. Agenda; Revisions and time frames Kirkwood Donavin
- 6. Review/Approve January 2017 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 Scholarship for online course
- d. Historian-Sue Bladorn
- e. Annual Conventions
 - i. 2017— Ira Rosenberg Portland
 - ii. 2018 Kirkwood Donavin Springfield
 - iii. 2019 Ashland June Brock
- f. Education Committee—June Brock
- g. Communications/Website Committee Report—Ira Rosenberg
- h. Legislative Committee Danial Stearns
 - i. Sara Lara-Director of Low Income Tax Office =Portland
 - ii. Flyin Day

- 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
- I. 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

12:12 PM 05/21/17 Cash Basis

Oregon Society of Enrolled Agents Balance Sheet

As of May 21, 2017

	May 21, 17
ASSETS Current Assets Checking/Savings Umpqua Checking	21,355.30
Total Checking/Savings	21,355.30
Total Current Assets	21,355.30
TOTAL ASSETS	21,365.30
LIABILITIES & EQUITY Equity Fund Balance Restricted Fund - Education Restricted Fund - L Scafidi Retained Earnings Net Income	16,808.57 1,526.71 548.10 -10,150.17 12,622.09
Yotal Equity	21,355.30
TOTAL LIABILITIES & EQUITY	21,355.30

Oregon Society of Enrolled Agents Profit & Loss Budget vs. Actual

July 1, 2016 through May 21, 2017

	Jul 1, '16 - May 21, 17	Budget	\$ Over Budget
Income			
Chapter Function Conference income	1,787.00 18,570.68	0.00 16,064.52	1,787.00 2,506.16
Dues			
Dues - Associates	8,246.00	6,246.29	1,999.71
Dues - Initiation Fees	162.00	0.00	162.00
Total Dues	8,408.00	6,246.29	2,161.71
Special Projects L Scafidi Education Fund	0.00	594.77	-594.77
Total Special Projects	0.00	594.77	-594.77
Total Income	28,765.68	22,905.58	5,860.10
Expense			
AFEX			
Airfare Lodging	925.57 1.271.37	600.00 1,630.00	325.57 -358.63
			
Total AFEX	2,196.94	2,230.00	-33.06
Bank Charge Credit Card Charge	335.68	375.00	-39.32
Total Bank Charge	335.68	375.00	-39.32
Board Meetings			
Meals for Board	342.50	300.00	42.50
Mileage	1,818.28	1,312.10	506.18
Total Board Meetings	2,160.78	1,612.10	548.68
Chapter Function Expense Committee Functions Communications	1,787.00	0.00	1,787.00
Website	16.92	67.00	-50.08
Total Communications	16.92	67.00	-50.08
Government Relations	114.50	0.00	114.50
Historian	0.00	53.52	-53.52
Policies and Procedures	0.00	13.55	-13.55
Total Committee Functions	131.42	134.07	-2.65
Conference Expense			
Other Conference expenses	814.09	792.58	21.51
Speaker Fee	0.00	1,463.23	-1,463.23
Travel and lodging for Speakers	838.09	541.94 0.00	296.15
Conference Expense - Other	134.09		134.09
Total Conference Expense	1,786.27	2,797.75	-1,011.48
Education Support	0.00	74.52	-74.52
Legal Fees	4,276.50	40.00	4,236.50
Licenses	55.00	50.00	5.00
lobbying	2,700.00	3,203,23	-503.23
Promotional Expense Supplies	714. 00 0.00	0.00 100.00	714.00 -100.00
Total Expense	16,143.59	10,616.67	5,526.92
•			·
Net Income	12,622.09	12,288.91	333.18

Pro	ejected # Actual #	Projected Co:	st		Inclusive \$72 per day
MONDAY:		Each			
Room Charge	1		0		
Board Lunch	20	23	460		
Service Charge	20	21%	96.6	\$557	\$557
Monday Total	25	0	50.0	4337	۱۰۰۰
TUESDAY:	23	Ü			
Room Charge	1	D	0		
Tuesday Total					3600
WEDNESDAY:					
Room Charge	1	0	0		
Banquet	50	30.69	1534.5		2100
Wednesday Total					3600
THURSDAY:					
Room Charge	1	٥	0		
Thursday Total					3600
Total Room and Meal Charges					\$11,357
Speaker Room Charges:					
Alan Pinkney	2	130	260		
Travis Greaves	1	179	179		
Jeff Wong	0		0	\$439	\$439
Speaker Speaking Fees:					
Alan Pinkney	8	290	2320		
Travis Greaves	7		2000		
Jeff Wong	2	250	500	\$4,820	\$4,820
Speaker Travel	1			\$0	\$0
Alan Pinkney	1	500	500	\$500	\$500
Travis Greaves	1	777.6	777.6	\$778	\$778
Speaker Materials/Copies	1	1,500	1500	\$1,500	\$1,500
Total Speaker Charges				\$6,75 9	\$8,037
Speaker Gifts	3	56.33	168.9 9	\$169	\$169
Sound system					
Labels					
Binders	50	3	150	\$150	\$150
Pens				\$134	134
Bag		400		\$709	709
Other Supplies	1	100	100	\$100	\$100
Banquet Entertainment	1	0	0	\$0	\$0
Lanyards & Badges Mailing Costs	1 1	U	0	\$0 \$0	\$0 \$0
Total Other Charges	Α.		Ū	\$0 \$1,262	\$1,262
TOTAL CHARGES FOR CONFERENCE				\$9,555	\$22,199

50

-\$3,629

Net Profit(Loss)

Projected attendees

OrSEA

Board Meeting May 11, 2017

Directors Report

Our Chapter has nothing new to report. We were going to hold a class in August, but have decided not to due to the Eclipse traffic, no available hotels and gas price increase in Bend.

Respectfully Submitted

Cindy Petersen Director East Central

OrSEA - Capital Chapter Profit & Loss

June 2016 through May 2017

	Jun '16 - May 17
Ordinary Income/Expense Income Other Types of Income Misc Revenue-Sale of Hando	55.00
Total Other Types of Income	55.00
Program Income Program Service Fees	4,470.00
Total Program Income	4,470.00
Total Income	4,525.00
Gross Profit	4,525.00
Expense Seminar Expenses Flyers & Postage Handouts Meals & Snacks Facility Rental Speaker Costs Mileage Reimbursement Accommadations Speaker Fees	130.00 87.50 207.92 675.00 352.40 163.98 1,500.00
Total Speaker Costs	2,016.38
Total Seminar Expenses	3,116.80
Business Expenses Bank Charges	130.41
Total Business Expenses	130.41
Total Expense	3,247.21
Net Ordinary Income	1,277.79
Net Income	1,277.79

OrSEA - Capital Chapter Balance Sheet

As of May 22, 2017

	May 22, 17
ASSETS Current Assets Checking/Savings WCB Checking	2,101.48
Total Checking/Savings	2,101.48
Total Current Assets	2,101.48
TOTAL ASSETS	2,101.48
LIABILITIES & EQUITY Liabilities Current Liabilities Accounts Payable Accounts Payable	8.69
Total Accounts Payable	8.69
Total Current Liabilities	8.69
Total Liabilities	8.69
Equity Opening Balance Equity Unrestricted Net Assets Net Income	2,000.00 175.71 -82.92
Total Equity	2,092.79
TOTAL LIABILITIES & EQUITY	2,101.48

OREGON SOCIETY OF ENROLLED AGENTS ANNUAL CONVENTION FOR 2019

I have contacted the Ashland Springs Hotel and have the information from them for the convention in 2019.

I have brought 10 copies of their proposal. If you are interested, please ask me for a copy. I will be discussing the financial aspects with Ira as he has handled that for the last few conferences. There are more options in the region if we deem this one too expensive.

Respectfully submitted

June M. Brock

First day, May 23, 2017, will be taught by Alan Pinck, EA. Topics to be The ABC's of a schedule C audit, Representing the cash intensive business and the The sale of a business and asset allocation.

Second day, May 24th will be Giovanni Alberotanza and Seth Groman from Washington DC. Their topics will be The ABC's of family limited partnerships, The new normal for tax practitioners (Ethics), and Up in smoke: the ethical and tax implications from the legalization of Marijuana.

Last day, May 25, will be Kent Anderson speaking on tax reform and Oregon taxpayers Bill of Rights. The afternoon section will be led by Jeff Wong on IC/ employee classification issues.

Alan Pinck and Jeff Wong have both spoken before at our conferences and have both been well received. I corresponded a lot with Travis Greaves out of Washington DC and had made an agreement with him to speak at this conference on the topics to be presented by Giovanni and Seth. But Travis ended up having some commitment issues and was unable to make the trip. But he arrange for these two gentlemen to fill in for him. We are receiving two presenters for the price on one. Kent has attended our conference before with his wife and has spoken to the Board on the topics he will be addressing here.

Hopefully this conference education will continue to uphold our standards.

June M. Brock, Education Chair

POLICIES & PROCEDURES COMMITTEE REPORT

May 22, 2017

The Policies & Procedures Committee has completed the slight change to the "Annual Conference Policies & Procedures" document. A copy is attached as part of this report and it was provided to the website committee for publication.

We welcome any comments and suggestions. The committee would like the Board to discuss and vote to approve the changes.

We are still working on the OrSEA job descriptions and will get back to that this year.

Respectfully submitted,

Susan Bladorn & Caty Giovinco Committee

.....OrSEA P&P Rept May 17.doc

ANNUAL CONFERENCE POLICIES & PROCEDURES

- 1. Date is established, three years in advance per OrSEA Policies & Procedures.
- il. Appoint Committee Chair(s)
- III. General Location is established.
- IV. Time Lines:
 - a. 2 ½ years prior to event:
 - i. Get Committee members.
 - ii. Estimate the number of potential attendees.
 - iii. Visit possible venues and get quotes for meeting room, hotel rooms, menus, technology requirements, directional sign boards, etc., etc., etc., Pricing is a key object for projecting the cost for attendees.
 - iv. Submit written report at quarterly Board meeting.
 - b. 18 months prior to event:
 - i. Make recommendation to Board and get approval.
 - ii. Make preliminary Agreement with facility "BEO" Banquet Event Order.
 - iii. Possibly renegotiate with facility & meet with event coordinator at site.
 - iv. President to sign preliminary BEO within 10 days of Board approval.
 - v. Treasurer to pay required deposit.
 - vi. Submit written report at quarterly Board meeting.
 - c. 11 months prior to event (July-August):
 - i. Meet with site representative to make meal choices (See item #2 in Other Considerations and Notes).
 - ii. Establish a "theme". Meet with committee to co-ordinate tasks lists.
 - Submit written report at quarterly Board meeting.
 - d. 9 months prior to event (early September):
 - i. Begin advertising event through newsletter and e-mail notifications. Send out a save the date notice and other known information.
 - Notify the Education Coordinator at NAEA to get the date on their website calendar of events.
 - iii. Submit written report at quarterly Board meeting.
 - e. 6 months prior to event (December):
 - i. Send Info e-blast to members and other tax organization members.
 - ii. Submit written report at quarterly Board meeting.
 - f. 5 months prior to event (January):
 - i. Send e-blast with speakers and registration information.
 - ii. Submit written report at quarterly Board meeting.

- g. 1 month prior to event (April):
 - Communicate with the venue as to the number of attendees and perhaps renegotiate the terms if more or less sign up as were anticipated. Also, communicate with the venue any special meals or needs.
 - ii. Confirm with volunteers and specifics.
 - iii. Write final committee report to submit at Board meeting and the Annual General Membership meeting.
 - iv. Name Tags and Meal Tickets for use at the conference need to be created. That task is handled by the Conference Chair and usually has been delegated to the person handling the registration list and fees (the Treasurer or Communications Committee Chair).
 - v. Conference reference materials provided by the speakers need to be printed, notebooks acquired, and materials inserted into notebooks. Coordinate this task with the Education Committee Chair.
 - vi. Sign-in Sheets need to be available for each day and each different session. Coordinate with Education Committee Chair.
 - vii. Send conference information to local CPA's, Tax Loop, & other organizations inviting more attendees.
- h. Monday before event during and after Board meeting:
 - i. Stuff Notebooks with speaker materials unless Education Chair has already handled that.
 - ii. Stuff OrSEA bags with promo items & highlighters. These items should be in the possession of the current Conference Committee Chair.
 - iii. Put nametags in lanyards; insert meal cards; get them to registration volunteers.
 - iv. Make sure sign-in table is set up for early morning registration volunteers.
 - v. Gather donated Silent Auction and Raffle items and coordinate with volunteers handling them. Get with Awards/Scholarship Committee Chair to get supplies (raffle tickets & Lou Scafidi Silent Auction sheets and supplies).

OTHER CONSIDERATIONS & NOTES:

- 1. Speakers and topics are lined up by the Education Chairperson. Budget is approximately \$9000 total for speaker costs spanning 3 days 22 hours cpe. Speaker lodging, travel, and meal choice arrangements are handled by the Education Committee Chair since that person will know the dates and other needs of the speakers.
- In July, select a menu, table coverings, room set up, technology, etc. Menu choices were based
 the cost per meal comparing the price to recent past charges and numbers. The 2015 board
 preferred a plated meal during the banquet rather than buffet style. Special diets must be
 considered and provided. Include request on registration form.
- 3. Registration form is coordinated with the Communications Chairperson, preferably prior to the January Board meeting and the beginning of tax season. The Board does not need to approve before publishing. Final speaker and topic info needs to be confirmed before it can be published. Include a late registration fee charge if postmarked 10 days or later prior to the event.

- 4. The registration monies are taken by the Communication Chairperson and given to the Treasurer for deposit. Many are now registering on-line and using debit or credit cards, also handled by the Communications Chair.
- 5. Take an inventory of items on hand and turn over to the next year Conference Chair.
- 6. No one knows how many more items will be needed until we have a count of attendees signing up with the Registration in April or May. Items needed are bags, lanyards, nametags, highlighters, special meal cards, and binders. All of the nametag supplies were given to Communications Chair who in the recent past has created nametags for those who registered. They were put together with the lanyards after the Board Meeting on Monday prior to the event. Banquet special meal cards were also inserted.
- 7. Send out requests to members to bring silent auction items. Refer to the Conference Committee Chair for direction and supplies (the fundraisers support the Lou Scafidi Scholarship Fund).
- 8. Send out requests to members to bring raffle items and find a willing Raffler for the breaks. Refer to Conference Committee Chair for direction and supplies.
- 9. Purchase speaker gifts maximum \$75 per speaker. Refer to Education Committee Chair to coordinate the acquisition. Try to get gifts from the geographic area or that commemorate the location that the conference is being held.
- 10. Purchase or otherwise obtain bag stuffers. We had Florence flyers from the Chamber and taffy. We supply the highlighters.
- 11. Line up who will volunteer for the sign in registration table (and hug them).
- 12. Who is going to be the emcee?
- 13. Try to get those expensive lanyards back and take a closing inventory after the last session. Supplies should go to the next Conference Committee Chairperson/s. At the next Board meeting report the supplies held and get with the Treasurer to order supplies that are low, so we have them for the next conference.

SOUTH CHAPTER REPORT

We did not have a meeting in May or in November to elect officers, so we continued with those who were officers from last year.

We are hoping to elect new officers this year in May at Conference. Our Nov.9th class had a poor turnout. Unfortunately we had to cancel our scheduled speaker and we hope to reschedule her for this year's fall Class to be held in November. I am looking into a different venue however to see if that can draw more people and have less cost for us.

We definitely still need more participation in our chapter. I realize people are busy, but we do need to find a solution. I would appreciate any suggestions at this point in time.

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 and it doesn't look like it will again this year's conference either with such a packed schedule. 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.

Sincerely,

Maddy Gaoiran, South Director and June Brock, South Director

OrSEA Membership Report

Board Meeting 5/22/17

Dear Board/Committee Members,

As of 5/19/17, the total membership count for OrSEA was 195 members strong. In the first quarter of 2017, we had 3 new members. In the second quarter so far we have 6 new members. This brings the total for this fiscal year to date of new members to 31.

Sincerely,

Maria Arbuckle, Membership Committee

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6/30/2017	8103/05/9	MOBK	garygaska@aol.com		acgenO	80	Gresham	is pie ann ce	ACTIVE	15525	Gaska	(16D
8103/16/6	8105\16\6 9105\14\7-408 (608)	MOBK	moo anoilulospontruoopagma@siepna		nogarO	90	AlisioM	13456 S Cayuse Ct	ACTIVE	155021	Garcia	slagnA
6/30/2018	8103/08/9 9/30/30/50/8	MORK	ien.oheuge@txsttond		Oregon	ЯО	North Bend	A 912 IZ JASMWƏN 4561	ACTIVE	88687	Gaoiran	Madillyn
8/31/2013	(503) 246-6 9/13/2011 8/31/2017	MORK	moc.xslbnsgqilouocascol@einnoc	2969-61276	Oregon	90	bnell⊓o¶	801 al2 byl8 judis8 W2 f2f0f	ACTIVE	92629	FOX	Connie
8102\f5\7	8102/12/12/2018 7/30/2018	MORK	moc.ecolaxsetecom	5099-55276	Oregon	я0	bisgiT	SVA AITA W2 G1601	ACTIVE	880801	Fletcher	Mary
6/30/2017	8102/06/9 8003/41/9 3-886 (603)	MORK	moo.nam@dt i Sabnemalautelo	6781-10576	Oregon	яO	nale2	2550 Market St NE	ACTIVE	84348	\$\$bn6m93	Suletus
6/30/2018	(541) 947-3 6/2/2006 6/30/2018	MORK	ejei.logik@gmail.com		Oregon	ЯO	Lakeview	15 418 N 828	ACTIVE	\$383S	29123	sinolnA
4102/06/9	8103/08/9 903/5/11 1/8/5002	MORK	taxman 1666@gmail.com		Oregon	ЯÓ	aug e7	BE # 78 YEWREIN 07 FT2	ACTIVE	49228	tioili3	гэтег
7131/2017	8105/15/7 S105/85/7 2-878 (148)	MOBK	рейгодралітс@уакоо.сот		Oregon		Chrisimas Valley	868 xoB Q4	SVITOA	100762	medgniii3	Patricia
8102/06/4	8103/5014 +130/5018	MORK	slick@yahoo.com		Oregon	яо	Eagle Point	18 nisMi W 151 E81 x08 OF	ACTIVE	102262	Rasiick ∃	airoJ
6/30/2017	8103/08/9 6/38/2009 6/30/5048	MORK	moo los@sol com		noganO	90	Engene	5861 xo8 Oq	ACTIVE	39000	noateQ	tanet
9/30/50/9	8103/06/9 9002/62/93-98# (1+9)	MORK	qousniu@usii com		Oregon	90	bleriginid2	SYV8 Mca St	ACTIVE	85658	aivened	Kirkwood
8/31/2013	(241) 244-1 8/4/2012 8/31/2012	MORK	мевау@ргороока)ах.сот	2161-92678	Oregon	90	ase9 atner5	116 NE Steiger St Ste B	ACTIVE	871901	DeMaree	Wendy
6/30/2017	8103/06/8 8003/81/88-886 (148)	MORK	qısus@q-mıjsxsuqscconujud com		Oregon	ЯÔ	bnsB	61396 S Highway 97 Ste 225	ACTIVE	779r8	yndruM-ysQ	ensiQ
6/30/2017	8102/08/9 9002/01/6 6/30/2018	MORK	moo.bnsdbsordbned@xodsoriz		nogenO	90	bris8	evA enoteemid 6860S	ACTIVE	€0658	èi∨8Œ	qoàce
4102/06/9	8102/06/9 F002/22/6 9-616 (609)	MORK	pdx/mi@holni\$il com		Oregon	90	Csupy	PO 80x 73	ACTIVE	77922	₽iveŒ	uyor
7102/1E/Z	(903) S38-C 3/S8/S01S 3/31/S018	MORK	eve@inoroultax.con		Oregon	90	Portland	3828 SE Division SI	ACTIVE	869601	sive	9∧∃
8102/06/9	(503) 228-C 1/14/1994 6/30/2018	WORK			Oregon	ЯÔ	Portland	019 578 Abba W2 013	ACTIVE	87866	Davidson	Michael
2/31/5011	8102/16/5 2102/92/1 2-999 (609)	MORK	rick@taxfinsol.com		Oregon	90	merlaan	151 SE 223rd Ave	₽VITOA	17214	YaveQ	Richard
6/30/2018	(e03) 336-C 4/53/1386	WORK	parp@parpapookauqtax com		Oregon	90	Satem	2659 Commercial St SE Ste 282B	ACTIVE	69969	Craven	Barbara
1/31/2019	8103/15/1 9103/1/3 1-329 (149)	WORK	Arckicoscis@Aspon colu		()regon	90	Roseburg	631 SE Rose St	ACTIVE		Coscia	Vicki
8/30/501X	(203) 693-6 8/18/2013	MORK	ымет@стрэсого		Oregon	90	Hillsburg	19720 NW Tanasbourne Or Ste 200	ACTIVE	150926	EemoO	Javiet
15/31/2012	(107) 921-2 17(301)	WORK	wearnick@connicklinancial com		emoldeO	ΑĐ	Crescent City	900 Northerest Dr #72	ACTIVE	124279	Connick	Wendy
3/31/2018	8102/15/6 1102/15/6 \$-036 (605)	WORK	· ·	1401-89076	Oregon	90	Weşi Linn	19022 Old River Dr	ACTIVE	88988	Christiansen	Şranjek
\$128/2018	8103/82/2 2138/1/26 5-209 (209)	WORK	siberi.cho@batmail.com		Oregon	ЯQ	i illisbaro	9VA (1)32 BN 6781	ACTIVE		Спо	hədiA
8/31/2017	7102/1618 \$102/1/6 3:526 (145)	WORK	шерь сецец@уапов сош	8680-88176	Oregon	80	Redmond	PO Box 2089	ACTIVE	55154	TaneO	Melba
6/30/2018	(203) \$35-€ 2/3/\$005	WORK	mos xelerative generales		Oregon	ЯŌ	Portland	SA12 SE Foster Rd	ACTIVE	41316	Carpenter	Barbara
6/30/2018	8102/06/9 6681/01/31 3-282 (203)	MOBK	mike@camentersearcom	97206-3954	Oregon	80	Portland	5412 SE Foaler Rd	ACTIVE	81989	Carpenter	Michael
8/32/15/6	(ADA) 580-C 4/1/2016 3/31/2018	WORK			Oregon	80	SillsvioD	Soc Siz by Birmoliff We God	ACTIVE	112822	(ladqms2	Tamsyn
8/31/5015	2103/12/8 6003/12/8 2-998 (980)	WORK	spaperest@hotman com			AW	Vancouver	606 SE 117th Ave	ACTIVE	76287	Holoniya	ensiA
10/31/2017	8102/16/01	WORK	оргоми@ш/масјачес сош осеои безија се по			AW	Vancouver	PO Box 873760	ACTIVE	0.00.	пиол	Philip
81/37/5018 9/30/5042	8102\re\tau \ 202\re\tau \ 609) (609) 8102\re\tau \ 7102\re\tau \ 609)	WORK	асеррі безірговесопільно сові		Oregon Oregon	яо	West Linn	00S 의견 b원 qirkanəxingiB 0081	ACTIVE	94687	Вгомп	Оерогар
		MORK	-		_	80	Jacksonville	PO Box 436	ACTIVE	07097	Brooks Brock	Carol
6/30/2018	810Z/08/9 866U/11/9 2-1/99 (1/9)	WORK	рьоскадамах пен		Oregon Oregon	80	Central Point	414 E bine St	ACTIVE	64923	Brener	д⊓ие
15/21/5015 9/30/5015	(203) 21.1-2 1/3/5008 13/31/5011 (203) 238/5018	MORK	унда Фургия (Сопт Украен об Соптан С		Oregon	80	Везменол	420 SW 11Th Ave # A254	ACTIVE	388Z0		Virginia Sharon
7102/05/8		WORK			_		Mitton Freewater	S 12 N IMBIN SI	ACTIVE	93590	Bowles	nitsut
11/30/2011	(241) 282-3 1/28/2011 1/30/2016	MORK	ლის სამლეთან და		Otegon Otegon	80	Medford	244 S Grape St	AVITOR	86996	Boomer Botillier	George
Z10Z/0E/9	2107/05/11 9107/1/21 2-0t/ (1tg)	HOME	mob.ksilamettetak.com		Ovegon	80	Coxyallis	1165 SW West Hills Rd	ACTIVE	N+N++	glenius glenius	epuij
1103/05/11	### ##################################	MOBK MOBK	Inde @walle metteten com	81035-8899 97267-2452	Oregon	80	Milwaukie Lake Oswego	3361 SE Asion Si 33611 SE Asion Sie P # 454	ACTIVE	44016 105622	Blay	Manette
6/30/2017	8102/02/1 6102/2/61 2-20/ (109/		rossesigitsesti tett		Otegon	90			ACTIVE		Bladorn	Dispirette
10/31/2017	\$105\U505\\ 110\U000\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	MOBK MOKK	shelbergeri @gກາລເLcom shelbergeri @gກາລເLcom		Oregon	90	Raseburg	\$ 820 35 1C9	ACTIVE	86166	Bladorn	Sheldon
2102/15/01	8102/15/01 1102/1/11 1-222 (126)	HOME	ерепуское гуман сош рмагреное гуман сош		Oregon	90	Redmond	3985 SW Ben Hogan Dr 832 SE 600h Ave	AVITOR	81266	Berns	Bradley
2102/12/2	8102/05/2 9102/11/39/2005 6/30/2018	MORK	denise@beancountertax com		Oregon	90	Springfield		ACTIVE	LECT/	Bean:	Denise
613013013	8102/15/9 2006/66/11 3-982 (11/5)	MORK	dbanks@gorge.net		Oregon	90		1293 1814 St	ACTIVE	73341	Banks	ապոր
10/3/15/01	\$102/16/9 2102/19 (1986 (199)	MOBK	protexsolutions@msn com protexsolutions@msn com	9769-60376	nogenO	90 90	Klemeth Fatts Hood River	5930 W Cascade Ave	ACTIVE ACTIVE	121083 121083	Banks	Vickee
8130/5018	8102/0E/9 902/82/tt (-988 (179)	WORK	catukprax@potusal com	5825-SZ616	Oregon	9O	Albany Klamalh Eath	H 97 S S 12 HH S LL 1	ACTIVE	64 8 87	Baker Seven	Calherine
10/3/15013	2102/1029 9000/90/17 928/17/97	MORK	avalostaxconsuting@yahob.com		Oregon	90	Central Point	494 SKBII WAR	ACTIVE	56212	SOIBVA	Thomas
10/37/2012	1102/16/01 9102/11/11	MON	karen.a@stralegiciax.inio		Oregon	80	Portisnd Central Pouri	1335 SW 668h Ave Api 229		111816	}(uA ≥crtevA	Karen
8102/06/1	8102/02/1 9102/1/11	МОКК	den signification of the contraction of the contrac	9071-021/6	Oregon	90	Bortland	IS smales W TY	ACTIVE ACTIVE	175811	S)mA nA	Deborah
6/30/2018	8102/08/1 9002/2/8 8-688 (11/3)	MOBK	faminy@taxnbooks.com		Oregon	90	Dried South	70 rg/lg 5615	AUTOA	122811	obsmA si⇔A	Татту
8102/16/9	810S/15/8 110S/8S/81-884 (508)	WORK	marbuckle87840@gmat com	706£-\$0876	Oregon	90	mals\$	875 ldylwood Dr SE	BVITOA BVITOA	0 18 78	Arbuckle	5nsM væreT
6/30/2017	8105/05/3 0005/12/21 2-182 (503)	MORK	loe@loeipelaskguy.com	97210	Oregon		bosino9 male2	25 NW 23/4 PH 6-401	ACTIVE	29829 01878	Anthony	qozeby
6/30/2017	8105/06/9 8661/06/4 P-P44 (608)	MORK	mannable@gman.com mon vunselbelleamin		_	6A 0R	Paradise	PO Box 2528		59859	eldsn/nA	nset M
6/30/2017	8102/05/9 9102/1/1-958 (605)	OFFICE	pean@eanandrewslax com		Oregon	80	Salem	H723 Hayesville Dr NE		~2023UUU	Andrews aldraus	neet
8102/06/9	8102/06/9 0661/16/8 2-669 (609)	MORK	wybsbłacijas com		Oregon	HQ	ិក្សេខថេ ក្រុមខេត្ត	12047 SW Caffall Ln	ACTIVE	96596	Alexander	udesor
8/02/16/9	8102/16/9 0681/16/8 5-669 (609)	MORK	wybapterijiaoj com		Oregon Oregon	90	Grants Pass	1690 NE Lynda Lo	ACTIVE BVITOA	969811	9ii6fA VelvisreiA	Windy
6130/2018	8102/06/9 7691/43/01 1-686 (178)	MORK	notaxingqwestollice net		Oregon	90	Bried Page Page	5 912 5 Yewright 2 61418	ACTIVE	959511	rio3gnibbA	Міслае
Fald Through	eted erigx3 effect niot \$ 600 Pt q				***				Membersh Avii:)A		Last Name	
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OrSEA Membership List as of 5/19/17

	Litzer	19919	ACTIVE	16221 SE Tibbetts St	Portland	RO	Oregon		litzer@comcast.net	MOBK	6661/61/01 0-192 (609)		6/30/2017
	Linebarger	90299	ACTIVE	309 Court St	The Dalles	AO	Oregon	1115-86076	ataxservice@gmail.com	MORK	1102/92/8 3-862 (149)		710S/1E/B
	Linders		ACTIVE	101 9ts is nisM 513	Allemeth Falls	RO	Oregon	7808-10876	jeff linders@pascolutionalic.com	WORK	\$105/21/93-488 (149)		7102/16/8
J sine	Linders	72860	ACTIVE	FOT 912 IS nisM ET 2	Klamath Falls	RO	Oregon	7808-10876	man all and ers@msolutions llc. com	MORK	6661/1/9 3-488 (143)		8/30/2018
	Lewis	91/096	ACTIVE	3604 SE Powell Valley Rd Apt 324	Gresham	AO	Oregon	6991-08076	cronemagic@aol.com	WORK	0102/4/5 3-478 (503)	4/30/2018	4/30/2018
J sidtny	Lawson	98878	ACTIVE	21882 SW Chehalis St	niteleuT	SO	Отедоп	\$506-S3076	cynlawson1@msn.com	MORK	110Z/E1/6 E-196 (E0G)	8/31/2017	8/31/2017
	Lauderdale	82667	ACTIVE	1307 NE 78th Street B12	Vancouver	AW				WORK			6/30/2017
orence L	Lasswell	26460	ACTIVE	418 WW 81h	Corvallis	RO	Oregon		lasswell@teleport.com	MORK	9002/1/8 1-637 (11/3)	6/30/2018	8130/2018
J blano	Larson	58576	ACTIVE	12 N Lincoln St	Post Falls	OI	orisbl	646-46868	zokan2001@yahoo.com	MOSK	0102/7/11 5-812 (143)	3 \710\2\15\8	8/31/2017
y dith	Krussow	35726	ACTIVE	PO Box 424	Corbett	AO	Oregon	97019-0424		WORK	0661/11/93-616 (603)		2102/08/9
	Kramien	98919	ACTIVE	19559 S Henrici Rd	Oregon City	AO	Oregon	E6E6*9t026	Jackkrannen@concast.net	MOBK	6102/1/8 5-168 (608)	7/31/2018	7/31/2017
lary K	Koehn	024801	ACTIVE						info@financialbalancedu.com	MOBK	2102/1/8 2-1/16 (503)	7/31/2018	7/31/2017
specca K	Klotz	11006	ACTIVE	PO Box 1885	Clackamas	AO	Oregon	9881-91076		MOBK	8003/6/01 1-329 (603)	9/30/2017	9/30/2017
A leine	Klauda	25664	ACTIVE	PO Box 2109	notaniW	AO	Oregon	97496-2109	tax@taxstrategiesinc.com	MORK	3991/8/11 8-978 (148)	6/30/2018	6/30/2017
arry K	Kjelden	27012	ACTIVE	9013 NE Highway 99 Ste O	Vancouver	AW	Mashingto	Et-68-59986 16	lkjelden@addvantagetax.com	MORK	3661/72/11 9-378 (036)	6/30/2018	6/30/2017
oberta K	Kinohi	88868	ACTIVE	9414 SW Barbur Blvd Ste 250	bothod	RO	Oregon	9849-61576	rgk@rgkinc.com	MOBK	(503) 246-£ 7/30/2004	6/30/2018	6/30/2017
higeyo K	Kikuchi	11216	ACTIVE	2080 SE Oak Grove Blvd., Ste 15	Portland	RO	Oregon	97267-2657		MORK	8005/2/01 1-707 (608)	9/30/2017	2102/06/6
okce K	Kanoff	90919	ACTIVE	2294 Pacific Blvd SE	Albany	AO	Oregon	7802-15679	Joyce kanoff@hrblock.com	MORK	7005/E1/6 3-826 (143)	6/30/2018	6/30/2017
L elleinds	noshqasot	668111	ACTIVE	2164 NE Broadway St	Portland	SO	окедон	97232-1513	gabrielle@artemistax.com	MORK	9102/1/2 1-902 (603)	1/31/2018	1/31/2018
L loss	nossenot	10918	ACTIVE	BVA HIST WITE	Engene	AO	Oregon	97401-3402	mos yneqmosbrenosseno@lores	MOBK	2661/92/9 4-146 (148)	9/30/5018	6/30/2017
	notandol	8007S	ACTIVE	61 S 2nd St	Central Point	RO	Oregon	97502-2208	mop.liemtorl@0401atm	MOBK	(503) 664-2 12/22/1989	6/30/2018	6/30/2017
L 619	Johnston	00919	ACTIVE	28424 SE Highway 212	Boung	RO	nagenO	4416-60076		MOBK	See1/1/01 5-688 (608)	6/30/2018	8/30/2018
r yate	uosuyor	32861	ACTIVE	18 YewidiH 271	Lostine	ЯO	Oregon	0919-78879	cathy@silvercreekteam.com	MORK	S10S/8S/7 S-688 (148)	7/31/2018	7/31/2017
L ybu	nosndol	93058	ACTIVE	60432 Snap Shot Loop	geug	RO	Oregon	652-20776	Judy@baraschjohnsontax.com	MORK	(503) 348-2 11/29/2009	11/30/2017	11/30/5017
L slied	nosudol	867111	ACTIVE	873 Hillylew Dr	briefricA	SHO	Oregon	7156-05376	chellaj1040@gmail.com	HOME	₱105/1/₱5-88₱ (1±3)	3/31/2018	3/31/2018
r abe/	gedne	75258	ACTIVE	10734 SE HIGHWAY 212	Clackanass	RO	Oregon	tv16-91026	made_jacque@yahoo.com	WORK	1102/12/13-723 (603)	1/31/2018	1/31/2018
a nylinel	Buivi	90999	VCTIVE	356 NW Pleasant View Dr	Grants Pass	RO	nogenO	9201-92926	moc.lemtor@cT-ybeixet	MORK	#661/61/01 t-62# (1#9)	8102/06/9	6/30/2017
arcello h	Innocenti	Lv29t	ACTIVE	2757 River Rd	Engene	HO	negenO	2403-10426	ten.tecmoo@onielde	MOBK	S005/6/01 1-689 (143)	11/30/2017	11/30/2017
lichael Ir	helml		ACTIVE	6127 SW 1618t PI	Beaverton	AO	Oregon	57007-4007e	imlah@easystreet.net	HOWE	9102/1/8 3-288 (603)	7/31/2018	7/31/2017
noda II	hander	84773	ACTIVE	348 Industry St	RinoteA	ЯO	Oregon	9059-50176	atc@seasurf.net	MORK	9002/61/7 9-825 (503)	1/31/5018	1/31/5018
H DIVE	Hummel	32733	ACTIVE	285 NW 86th Ave	Portland	RO	Oregon	9099-62246	drhummel@comcast.net	MORK	1661/62/8 3-262 (608)	6/30/2018	8/30/2018
н хә	Howe	29488	ACTIVE	PO Box 885	Clackamas	OR	Oregon	9880-91076	rexhowe@earthlink.net	MORK	2102/2/7 7-868 (503)	6/30/2018	2102/02/9
H slied	Howe	96944	ACTIVE	PO Box 803	BileloM	SO	Oregon	6080-86076	rnoo.xstallslom@slisha	WORK	£003/82/£ 3-628 (£09)	12/31/2017	12/31/2017
epta H	Howard	818811	ACTIVE	PO Box 633	Albany	AO	Oregon	97321-0204	DEBRAS41@COMCAST.NET	HOME	9102/1/9 2-186 (149)	4/30/2018	4/30/2017
H Ebnilal	Holberton	Z9669	ACTIVE	PO Box 55236	poethoq	RO	negaro	9523-85276	holbertontaxservice@comcast net	WORK	(203) 802-6 6/1/2000	9/30/2018	6/30/2018
H Brino	Hines	73580	ACTIVE	568 NE Savannah Dr Ste 2	Bend	RO	Oregon	9981-10776	donna@bkptaxservice.com	MORK	2002/11/2 3-885 (11/2)	6/30/2018	6/30/2017
H neeli	Hines	59517	ACTIVE	5319 SW Westgale Dr Ste 139	Portland	SO	Oregon	97221-2430	moo.onul@nemilis	WORK	(503) 297-1 2/26/2013	5/28/2018	2/28/2018
H uesn	цбін	01997	ACTIVE	45 82nd Dr Ste 55	Gladslone	RO	Oregon	2992-75076	shigh@clackatax.com	MORK	9002/12/6 2-999 (209)	6/30/2018	6/30/2017
ammy H	sbuilseH	160501	ACTIVE	15 415 S SS	Central Point	AO	Oregon	97502-2474	moo.sgnitsedymmet@sgnitsedt	MORK	9102/1/2 8-109 (11/9)	1/31/2018	1/31/2018
H ale	Haskin	98999	ACTIVE	12011 NE Clisan St	Portland	RO	Oregon	7981-05279	dalehaskin3@comcast.net	MOBK	6002/6/6 5-292 (209)	8/31/2017	T105/15/8
H meilii\	Harshbarger	113720	VCTIVE	8035 Kahnie Trail Loop	Nebalem	RO	Oregon	97131-9727	harshbarger@nehalentel	HOWE	9102/1/2 3-898 (603)	4/30/2018	4/30/2017
H bive	Harmsen	87878	ACTIVE	4038 N Interstate Ave	Portland	RO	Oregon	97227-1071	david@pcapdx.com	MOBK	(503) 238-C 1/24/2008	6/30/2018	2102/06/9
H Hoo	neginneH	00986	ACTIVE	716 SE 69th Ave	Portland	SO	Oregon	9112-2116	fan.tssamoa@neginnerha	MORK	(503) 720-2 9/2/2009	8/31/2017	8/31/2017
H listing niny	nilbnsH	88678	ACTIVE	2801 SE 122nd Ave	Portland	SO	Oregon	97236-3203	moo.sledda@nnyl	MORK	(503) 761-5 2/20/2002	12/31/2017	12/31/2017
H us	HeweneH	11896	ACTIVE	ld 416 MS 2106	Portland	RO	Oregon	97219-4709	alan_hanawalt@yahoo.com	WORK	(503) 481-C 5/20/2013	11/30/5013	11/30/2017
heresa H	Hamlin	00488	ACTIVE	PO Box 67	Myrtle Point	OR	Oregon	7800-88476	moo.nilmenehaldesesaent	MORK	(541) 572-5 4/1/2017	3/31/5018	3/31/2018
н	Hamilton	27558	ACTIVE	12 holyef 0111	Engene	ЯО	Oregon	97402-3822	blaneandjan@comcast.net	MORK	9002/11/9 3-446 (149)	6/30/2018	6/30/2017
H ista	SB6H	101627	ACTIVE	bA agas 2 corp	Medford	RO	Oregon	0046-10946	taxbuck@yahoo com	MORK	0102/61/9 3-277 (148)	8/31/2018	8/31/2018
o yan	Gunn	97274	ACTIVE	885 NE 14 SI	Grants Pass	ЯО	Oregon	9291-92926	ruthe@cedarcornerlax.com	MOBK	1102/02/6 1-621 (119)	9/30/2017	9/30/2017
эск С	Griffin	P8949	ACTIVE	5200 Meadows Rd 51e 150	Lake Oswego	ЯО	Oregon	9900-9E026	Jack@grifftax.net	MORK	6661/02/1 3-269 (£05)	6/30/2018	2102/06/9
eue e	Gresick	82068	ACTIVE	4365 NW Queens Ave	Corvallis	RO	Oregon	97330-3228	ignalize @comcast.net	WORK	8002/8/01 7-527 (148)	8/31/2018	5/31/2018
tanley C	Gresick	85173	ACTIVE	4365 NW Queens Ave	Corvallis	RO	Oregon	97330-3228	stan.gresick@gresicktax.com	MORK	9002/81/8 4-557 (144)	9 8102/06/9	8/30/2018
o aisn	Cregory	88616	VCTIVE	1325 SE COPP SI	Roseburg	RO	Oregon	9504-07476	moo.liemg@84galsus	WORK	6861/1/81-678 (148)	9/30/5018	2102/08/9
o uesn	Girouard	34568	ACTIVE	1845 Fairgrounds Rd NE	Salem	RO	Oregon	97301-7132	moo jieuu6@0+016aisns	MORK	8002/11/21-666 (603)	6/30/2018	6/30/2018
athenne C	Giovinco	54288	ACTIVE	821 YSWAQIH 26801	Wapleton	ЯО	Oregon	9096-69446	asc5@qwestoffice.net	MORK	(241) Se8-C 10/SE/1662		6/30/2017
D Bna	Gilmore	101624	ACTIVE	2164 NE Broadway St	Portland	RO	Oregon	£151-Z£276	moo.xetziməha@enəii	WORK	(503) 206-4 5/1/2017	4/30/2018	4/30/2018
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Scholarships and Awards Committee Report

Have only one person who expressed interest in the NTPI scholarship and the question asked was if it could be used for the on line class. Discussion will be needed on this.

This year only the President's Award will be given. I have not seen or heard of any actions that would warrant the presentation of the Founders' and the Lifetime Achievement Awards. Hopefully, that will change this year. I will once again speak to the requirements for the these awards at the banquet and ask that everyone keep their eyes and ears open so that they can share with me some people who should be considered in the future.

Once again, Maddy Gaorian and Sue Bladorn will be coordinating the Silent Auction and the Raffle. If you have brought any items for either be sure and give to one of them. Also, take time to thank them for their service as they have done this for the last few years to raise money for the scholarship fund.

Respectfully presented,

June M. Brock, Chairman

HISTORIAN COMMITTEE REPORT

May 22, 2017

The OrSEA scrapbooks are up to date and the records and photos go back through 1990. They are now on the website only back through 2013. Communications Committee made changes to the website and the old ones had to be dropped. Scrapbooks are on display at the conference.

The Historian Notebook includes up to date lists of the past recipients of the Founders, Lifetime Achievement and President's Awards. It also includes a list of past recipients of the NTPI Scholarships given by OrSEA. Year 2012 is incomplete and recipient names are needed. Included in the records is a listing of past education speakers and topics complete back to 1990.

The committee is still working on updating the job descriptions for each notebook.

Respectfully submitted,

Susan Bladom, Chair

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