

Oregon Society of Enrolled Agents
Board of Directors Meeting
Zoom Meeting
May 18, 2020

Meeting called to order by President Maddy Gaoiran at 11:15 am.

Mission statement was read by Maddy Gaoiran, President.

There were enough present for a quorum. Verbal attendance was taken. Those attending were to email secretary a signature sheet. Those are attached.

Carol Wild read minutes she took at January 17, 2020 Board Meeting due to absents of Barbara Craven, secretary. Moved to email minutes with changes to get email approval. Motion seconded by Michael Davidson. Motion passed.

President's Report:

Maddy Gaoiran - Report attached.

Vice President's Report:

Eve Davis - No report.

Treasurer Report:

June Brock – Said she would e-mail P & L and Balance Sheet.

Director(s) Reports:

Central Directors: Joyce Davis & Kirkwood Donavin - No report.

South Directors: Sue Bladorn & Marie Linders – No report.

North Directors: Michael Davidson & Anna Burgess – No report.

Committee Reports:

Membership: Maria Arbuckle & Eve Davis – No report. Membership rooster attached.

By-Laws: Daniel Stearns – No report.

Policy & Procedures: Susan Bladorn – No report.

Scholarships & Awards: Susan Bladorn & Carol Wild – Going to write article for newsletter. Will have form on website.

Communications/Website:

Daniel Stearns - Website: E-mail exact changes needed.

Ira Rosenberg – Newsletter: Going good.

Historian: Susan Bladorn – No report.

Government Relations: Michael Davidson & Carol Wild – Forum set for Oct. 30th at Embassy Suites. More information at July meeting.

Legislative: Daniel Stearns – “no one home” report.

Future Annual Conferences:

May 2020 moved to July 2020. Daniel Stearns moved to cancel conference this year. Michael Davidson seconded. Motion passed. Daniel Stearns moved to have 2021 conference at Hood River. Eve Davis seconded. Motion passed. Eve Davis will contact hotel to reserve new date.

May 2021 for Bend has been changed to Hood River.

May 2022 possibly in Klamath Falls. Marie Linders is checking into it.

May 2023 needs to be decided on where and whom will chair.

New Business:

Discuss January 2021 update class with Dale Moreno at July meeting.

Next Board meetings:

July 24, 2020 by Zoom

October 23, 2020 by Zoom

December 11, 2020 (possibly by Zoom)

Current Board Meeting times vary due to Covid-19.

Moved by Susan Bladorn to adjourn the meeting . Seconded Daniel Stearns. Passed and adjourned at 1:55pm

Respectfully Submitted,
Barbara J. Craven, Secretary

OREGON SOCIETY OF ENROLLED AGENTS
EXECUTIVE BOARD AND BOARD OF DIRECTORS MEETING
AGENDA FOR MEETING ON MAY 18, 2020
BY WAY OF ZOOM VIRTUAL MEETING

PLEASE EMAIL ALL YOUR REPORTS TO EACH BOARD MEMBER BEFORE THE MEETING!

1. 11:00 AM Get signed into ZOOM from Eve's email she sent you
2. Call to Order, Welcome everyone to our NEW VIRTUAL MEETING!
3. Quorum check: Eve Davis, Vice President!
 - A. READ OrSEA Mission Statement.
4. Secretary, Barbara Craven: Sign in will be done a little differently:
 1. Send Barbara, our Secretary, an email with your scanned signature on it for our records with the date of the meeting at the top of your email and in the subject line!
 2. Barbara will record all the FACES she sees on the ZOOM that are attending the ZOOM meeting and match them up with your signatures!
5. Secretary Report: Review & Approve January 10, 2020 Board Meeting Minutes taken by Carol Wild, EA

Close to Lunch TIME: Please have your lunch/drinks with you at your desk for this meeting.

EAT YOUR LUNCH whenever you want to,

The Virtual meeting WILL CONTINUE, since it is OUR First One!

6. President's Report: Maddy Gairan
7. Vice President's Report: Eve Davis
8. Treasurer's Report: June Brock
9. MAY 2020 SWITCHED TO JULY 2020 CONFERENCE:
 - A. PRESIDENT'S THOUGHTS AND PROPOSALS on 2020 CONFERENCE:
 1. CONTINUE with JULY CONFERENCE,
 2. RECORD this year's Conference and future ones and offer it on our Website for a Fee, like NAEA Does for Education offered to members! This would bring us more revenue for ORSEA. Of course, Need to look into HOW to get this SETUP for our group moving forward.
 3. Propose we Cut 2020 Conference to TWO DAYS instead of THREE, to save us money on costs, if the hotel will allow it, anticipating less attendees because of the Virus. Especially since we've already paid for Frank Degan's flight. Of course that does mean we will have to decrease the cost of Conference this year, only if the Board accepts this proposal.
 - B. Open NOW for DISCUSSION and ANY OTHER PROPOSALS by BOARD MEMBERS: One at a Time, please!

VOTE on whether or NOT to Cancel or Continue the JULY CONFERENCE, After Discussion!

IF IT IS DECIDED TO GO AHEAD WITH 2020 CONFERENCE; THEN WE WILL DISCUSS THE FOLLOWING:

JULY 2020 ... HOOD RIVER CONFERENCE REPORTS:

- 1 Contracts as of now: Anne Burgess
- 2 Schedule line up and Budget as of now: IRA Rosenberg
- 3 Education Status as of now, by Nicole Piehl for 2020 Conference

ON MONDAY JULY 20, 2020 ALL BOARD MEMBERS WILL HELP WITH BINDERS, STUFFING BAGS, DISPLAYS OF AUCTION AND RAFFLE ITEMS; SET UP ANY POSTERS.

WE DO NEED VOLUNTEERS TO HELP WITH CONFERENCE!

SIGN IN TABLE AND HANDOUT BAGS

RAFFLE AND SILENT AUCTION VOLUNTEERS

(MARIA ARBUCKLE COULD YOU PLEASE CONTACT ATTENDEES TO BRING DONATIONS IN FOR RAFFLE AND SILENT AUCTION ITEM BASKETS? ALSO CONTACT BUSINESSES TO DONATE FOR A BIG TICKET ITEM.

NOMINATING COMMITTEE for JULY 2020 CONFERENCE, Daniel Stearns, Past President

Slate of out going Officers and Directors

Suggestions for vacating Officers and Directors for Daniel to contact would be appreciated.

10. FUTURE ANNUAL CONFERENCES:

- A. MAY 2021 BEND CONFERENCE REPORT from Barbara Craven
- B. MAY 2022 DISCUSS at MAY 2020 VIRTUAL BOARD MEETING!
 - i. 2022- Klamath Falls (possibly) Marie Linders is looking into this.
 - ii. 2022- ANY other suggestions will be discussed at May meeting!
- C. MAY 2023- NEED TO DISCUSS where and Whom will be in charge!

11. DIRECTOR'S REPORTS:

- A. North Directors— Michael Davidson and Anne Burgess.
- B. Central Directors— Joyce Davis and Kirkwood Donavin
- C. South Directors – Susan Bladorn and Marie Linders

12. COMMITTEE REPORTS:

- A. Membership – Maria Arbuckle and Eve Davis
 1. Suggestions for Volunteers that are Members, not necessarily on the Board.

2 Need any New Membership brochures, etc. for Packets?

1. Need Inventory of what we have and what we need.

B. By Laws – Daniel Stearns

1. Any changes from NAEA?

C. Policy & Procedures – Susan Bladorn:

- 1 Note Books for each officer will be reminded from now on to BRING TO EVERY BOARD MEETING with any new changes you may have. (I know this might not seem that important; but it actually is helpful if we have them to refer to during the meetings.)

D. Scholarships and Awards: Sue Bladorn and Carol Wild

- 1 NTPI (NAEA CONFERENCE IN SCOTTSDALE, AZ) HAS BEEN CANCELLED FOR 2020! SORRY!
- 2 There will be no Scholarships awarded this year for NTPI,
- 3 Perhaps we can award one through a 'DRAWING' of all physical Attendees to This Year's 2020 Conference, if we have ONE that is as a "goodwill gesture" for to Our Members!

E. Communications/Website: = Daniel Stearns and Ira Rosenberg

- 1 Daniel: Website:
 - A. Can we Add Membership Contact for anyone with Illnesses, losses, etc.?
- 2 Ira Report on Newsletter

F. Historian- Sue Bladorn-

- 1 Forward cell phone or camera photos of any Chapter classes or Conferences you may have attended to Sue for our scrapbooks and picture frame.
 - a. VITAL PART OF ORSEA Helps Newer Members to OrSEA be aware of traditions, etc. of OrSEA and is just FUN for All members to reminisce.

G. Government Relations – Michael Davidson and Carol Wild

H. Legislative- Daniel Stearns: "Drive In to Salem" postponed for now.

13. New and/or Pending Business/ Good of the Order:

- A. PLAN AHEAD means scheduling Board Meetings ahead of time:
 1. Next Board meeting: JULY 20, 2020! At CONFERENCE IN HOOD RIVER!
 2. October 23, 2020
 3. December 11, 2020 (because we need to plan if we're going to have a January UPDATE again in Wilsonville)
- B. At MAY VIRTUAL Board meeting we will schedule someone to Audit our Books by July
- C. Schedule an AUGUST---- FOR NEW OFFICER'S TRAINING MEETING on the COAST!
- D. December Board Meeting WILL BE MY APPRECIATION Board Meeting again on the Coast.

14. Adjourn by 4 pm

SIGN IN SHEET
(verbal check in)

Board Meeting MAY 18, 2020
MEETING BY ZOOM @ 11:15 a.m.

Sue Bladorn _____ HERE _____

June Brock _____ HERE _____

Anne Burgess _____ HERE _____

Barbara Craven _____ HERE _____

Michael Davidson _____ HERE _____

Evelyn Davis – V. President _____ HERE _____

Joyce Davis _____ HERE _____

Maddy Gairan – President _____ HERE _____

Nicole Piehl _____ HERE _____

Ira Rosenberg _____ HERE _____

Daniel Stearns – Past Pres. _____ HERE _____

Carol Wild _____ HERE _____

Catherine Giovinco _____ HERE _____

ADDUMDEN TO VERBAL E-MAIL SIGNATURES.

The following board members need to still send me their attendance sheets

Anne Burgess

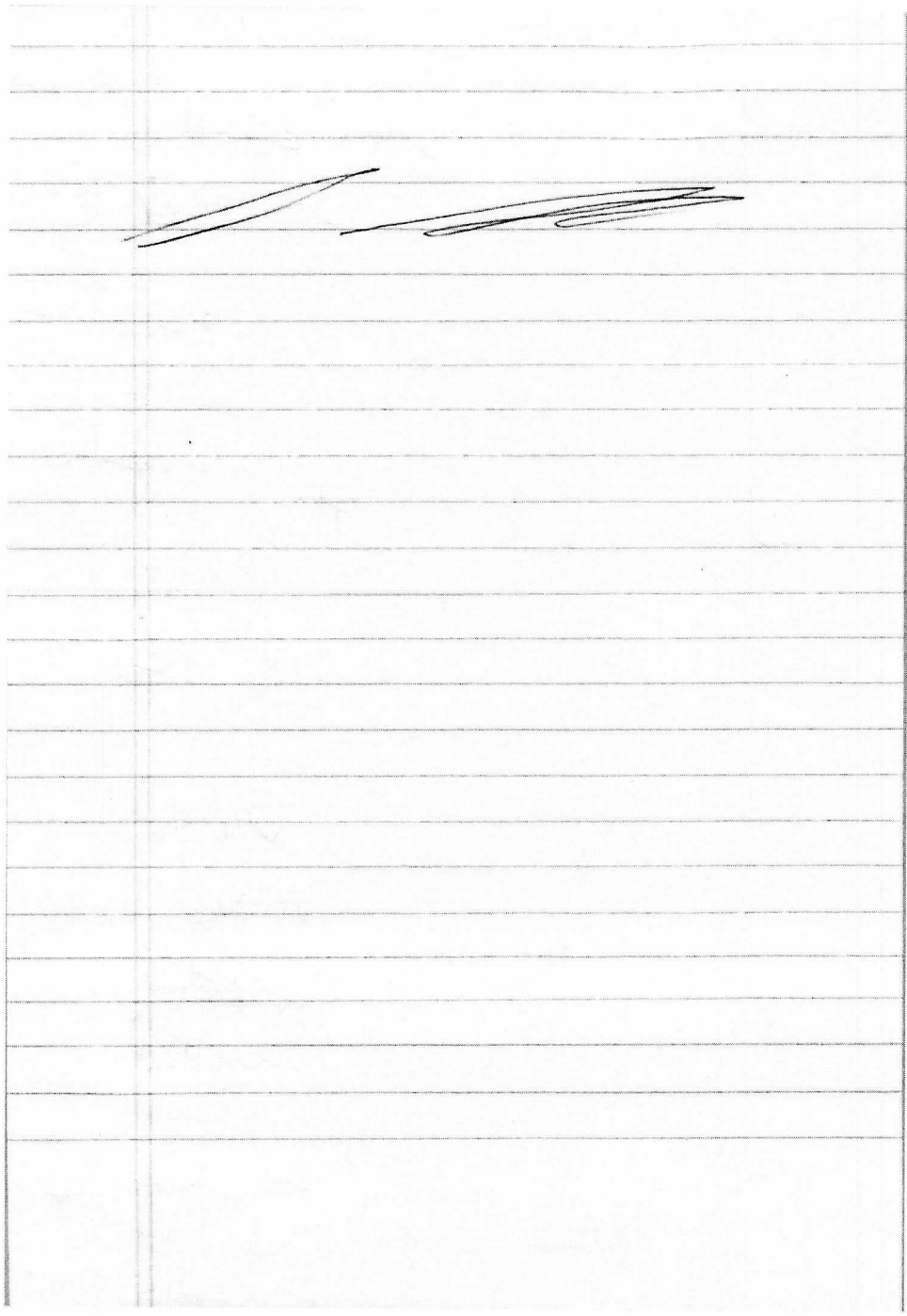
Michael Davidson

Eve Davis

Maddy Gairan

Daniel Stearns

masu f





Or Sea Board meeting

Joyelma Davis

Please do not email my signature
without encryption.

05/18/2020 OrSEA

Zoom meeting

I attended this meeting.

Juan Bladon

May 18, 2020 to

ORSEA

June M. Block

Oresa Board Meeting

5/18/2020

Attended

Carol M Wadd

ORSEA January 17, 2020 Board Meeting

Meeting convened at 11:15 a.m. by Vice President Eve Davis. Attending members: Sue Bladorn, Michael Davidson, Eve Davis, Katy Giovinco, Daniel Stearns, Carol Wild (acting secretary)
Attending part of meeting: Maddy Gairan (attended second half), Barb Craven (attended part of meeting), Nicole Piehl, Ira Rosenberg. Absent: June Brock, Kirkwood Donavin, Marie Linders, Peter Mar (resigned previous week), Dale Marino

Nicole (partly late?)

Note – many late arrivals, so there was a fair amount of jumping back and forth between sections. Minutes may not reflect chronological recording of topics.

Once it was determined a quorum was present, minutes from prior meeting were read. It was noted that approximately, \$1800 is in the Capital Account. Michael Davidson moved to accept the minutes as amended. Carol Wild seconded the motion.

President's report: Tabled until Maddy could join us.

Vice-President's Report- Eve Davis: There was a Practice Management presentation for continuing education for Portland Chapter on December 12, 2019. Eve says she feels EA Continuing education should focus on specialized education that may or may not result in CE. Important to differentiate ourselves from other organizations in the state. Discussion from other board members at that point included: Dan Stearns added that we need to focus on who we market too, i.e. we may focus more on tax prep business owners. Sue Bladorn commented on the high number of LTPs that attended a recent Southern ORSEA event. Eve also mentioned good turnout for a low cost Portland update event that has been previously handled by OATC.
[Note: Need copy of VP's written report]

Treasurer's Report – June Brock – tabled to see if June would arrive later. Some discussion ensued. Daniel Stearns asked if we should discuss helping June out and offered that he could take over if needed. He thought that June has missed the last three meetings. Dan went on to say he would like it to show what Ted Hughes (lobbyist) has been paid (if anything) and the need to avoid late filing – so no issues with Oregon Ethics. Other issues – need to know what to charge for the Annual Conference, but without Treasurer's Report that's hard to determine. Katy Giovani asked if the 990-N has been filed and Dan indicated that has been done.

[Note: Need copy of Treasurer's written report]

Dale Marino – Portland January 2020 education event – See VP report above as Dale not present. Cost was \$60 and Daniel Stearns said about 125 attendees.

Membership: Maria has an Excel spreadsheet with names and email addresses in a format that can be used for Mail Merge. Constant Contact was mentioned as a good way to keep in touch with members – Ira has a copy from another organization he's a member of. Dan suggested we budget to purchase our own copy, and Sue Bladorn indicated that ORSEA does own a copy. Nonprofit version is \$35 a month. Ira has two lists – one that is EAs only, and second list that has other past attendees. Michael Davidson said that if Ira pays the cost, that should be considered a contribution, but that the list on Constant Contact should be ORSEA's.

Action Item: Sort out the subscription of Constant Contact. Dan will talk to Ira to add another person as an administrator, stressing the need to have redundancy on everything within the organization.

A copy of the membership list through Excel provided.

Kirkwood Donavin – Audit report – tabled until later

Nicole Piehl – Education – May 2020 Hood River – tabled until Nicole's scheduled arrival time.

Carol Wild made motion to add Maddy via conference call. Daniel Stearns seconded the motion. Motion passed and Sue Bladorn contacted Maddy to add her to the meeting.

(Verbal)Treasurer's Report through Maddy via phone:

P&L shows Dues Revenues of \$2626 and Update Education January session of \$7764. Expenses for the update session were \$4205 with one bill still to be paid. Net Income for the period is \$2168.86. Checking account has \$13,938,61. Discussion included a desire to see details of checks and deposits.

[See P&L and Balance Sheet for all details]

Nicole Piehl – Education – May 2020 Hood River:

Detailed education report attached. Summary (includes modifications): Mark Pierce for 8 hours; Frank Degan for 8 hours (6 on Wednesday 20th and 2 hours on Thursday 21st); Joyce and Daryl Davis for 4 hours. Remaining slot Nicole proposed Dennie Wheeler. It would be about \$900 for Lodging and Mileage if Dennie Wheeler is brought in for Partnership presentation at the conference. Dan and Maddy both liked the idea of adding Dennie Wheeler.

Discussion ensued on which of the possible seven topics Frank Degan suggested should be finalized. Board selected Topic 2 (Substantial Authority- Ethics) for Thursday morning, and

Topics 5, 6, and 7 (Defending Form 1040; The IRM – A look at IRS Policies; and 199a Q&A from the Field) for the remaining 6 hours.

Other Discussion: Caty clarified that the annual membership meeting is usually on Wednesday but that the board meeting is on Monday prior to start of conference. Ira spoke to Nicole about pre-printing CE certificates AS IF all attendees attend all sessions, then withhold those that need to be modified for reduced hours. Maddy added that the certificates will need Nicole's signature and Ira will use a template Nicole sends him for topics/hours/attendees, etc. Ira said he will also add all the email addresses from the January update to the Constant Contact list. Suggests landscape printing for sign-in sheets.

Parking meter break at 1:02 pm.

Resume at 1:13

Barbara Craven – Education – 2021 Conference. Checked River House – if enough food and drink ordered, then no room charge. Located near Shilo Inn on the main road. (ORSEA was there about 10 years ago. Barb will have detailed costs for the May board meeting. Michael asked if pets are okay, and Nicole suggested that Barb be able to sign for the hotel before the May board meeting if she's okay with what Checked River House proposes. In this way momentum on planning won't be lost.

Ira Rosenberg – added to 2020 Conference information – noting that Daniel, Anne, Carol, and he went to see the Hood River facilities, look at sample menus and provided projected budget (see attached). Proposed attendance cost: \$375 if not attended in last 3 years, \$425 for full members, and \$475 for non-members. Have about 8K minimum for food. After viewing the menu, Caty proposed moving the Mexican meal to the last day. Ira will order bags for the books. Requests were larger lettering on the bag if no extra cost, better quality than the last batch, and no zipper on the bags. Nicole asked if we should consider digital copy instead of hard copy. Nicole will email Ira as point person for the conference bags/pens, etc. Projected \$2 for 4" notebook. Maddy will pickup pens and pencils at Fly-In in May.

Kirkwood Donavin: Denise Bean looked at the books through 2018. Asked that Maddy send a thank you to Denis for her audit work (and to George who did the actual work). Covered 7/1/17 – 6/3/18 fiscal year. Only 3 deposit slips for May 2018 but the remainder were deposited electronically. Kirkwood mentioned also that he would be available in July to take over for Peter Mar, who resigned last week..

**ORSEA
Member Roster
May 18, 2020**

NAEA ID	First Name	Last Name	Address 1	City	State	Postal Code	Email	Phone	Phone	Join Date	Expiration
400630	Windy	Alarie	1690 NE Lynda Ln	Grants Pass	OR	97526-3591	wtaxwindy@MOBILE	(541) 476-5	6/1/2014	5/31/2021	
110313	Joseph	Alexander	12047 SW Caffall Ln	Tigard	OR	97224-0001	wvbsbbs@MOBILE	(503) 639-2	8/31/1990	6/30/2021	
408750	Carolyn	Anderson	525 W Gloucester St	Gladstone	OR	97027-2041	carole@th@MOBILE	(503) 777-1	9/1/2017	2/28/2021	
163571	M. Jean	Annable	PO Box 2528	Paradise	CA	95967-2521	mjannable@MOBILE	(503) 774-4	7/30/1998	6/30/2021	
163573	Joseph	Anthony	25 NW 23rd Pl Ste 6-401	Portland	OR	97210-5581	joeth@MOBILE	(503) 281-2	12/21/2000	1/31/2021	
246856	Maria	Arbuckle	875 Idylwood Dr SE	Salem	OR	97302-3901	marbuckle@MOBILE	(503) 485-1	5/25/2011	10/31/2020	
240874	Tammy	Arnado	21359 Puffin Dr	Bend	OR	97701-9621	tammy@ta@MOBILE	(541) 389-4	8/2/2006	6/30/2021	
246090	Thomas	Avalos	494 Strait Way	Central Poi	OR	97502-1731	avalostax@MOBILE	(541) 659-3	10/16/2008	11/30/2020	
213255	Catherine	Baker	1113 Hill St SE Ste H	Albany	OR	97322-3281	cathybrax@MOBILE	(541) 926-1	4/28/2005	6/30/2021	
245536	Wickie	Baker	5624 Delaware Ave	Klamath Fa	OR	97603-6921	protaxsolu@WORK	(541) 885-2	10/26/2011	10/31/2020	
210309	Denise	Bean	1293 18th St	Springfield	OR	97477-3411	denise@be@MOBILE	(541) 726-0	11/22/2002	6/30/2021	
109944	Susan	Bladorn	631 SE Rose St	Roseburg	OR	97470-4921	roset@ro@MOBILE	(541) 672-4	5/11/1990	6/30/2021	
311298	Marlette	Blay	825 NE 20th Ave Ste 320	Portland	OR	97232-2271	marlette@MOBILE	(503) 703-3	12/2/2012	11/30/2020	
410495	John	Bowen	1900 NE Highway 99W Ste C3	McMinnvill	OR	97128-2751	johnbower@MOBILE	(971) 832-2	7/1/2018	6/30/2021	
166003	June	Brock	414 E Pine St	Central Poi	OR	97502-2441	jbrock9092@MOBILE	(541) 664-3	5/11/1998	6/30/2021	
112495	Carol	Brooks	PO Box 435	Jacksonvill	OR	97530-0431	urtaxlady@MOBILE	(541) 899-1	11/10/1992	6/30/2021	
410794	Anne	Burgess	3828 SE Division St	Portland	OR	97202-1641	anne@inor-	(541) 999-4	5/1/2019	4/30/2021	
413078	Dawn	Buxton	-	-	-	-	dawn@bun@MOBILE	(541) 999-4	12/1/2019	11/30/2020	
407051	Donna	Byrne	PO Box 655	Independe	OR	97351-0651	donna.byrn@MOBILE	(503) 765-3	9/1/2017	8/31/2020	
167956	Barbara	Carpenter	5412 SE Foster Rd	Portland	OR	97206-3951	barbara@c@MOBILE	(503) 232-4	5/3/2002	6/30/2021	
148562	Michael	Carpenter	5412 SE Foster Rd	Portland	OR	97206-3951	mike@car@WORK	(503) 232-4	12/10/1999	6/30/2021	
400988	Melba	Carter	PO Box 2089	Redmond	OR	97756-0531	melba.cart@MOBILE	(541) 923-4	9/1/2014	8/31/2020	
268451	Stanley	Christiansen	19022 Old River Dr	West Linn	OR	97068-1041	Stan@Chr@MOBILE	(503) 320-5	3/31/2011	3/31/2021	
261537	Stacy	Collins	17656 Paladin Dr	Bend	OR	97703-9131	stacycollins@MOBILE	(541) 788-4	3/17/2011	3/31/2021	
245538	Javier	Correa	9620 NE Tanasbourne Dr Ste 200	Hillsboro	OR	97124-7841	javier@cib@MOBILE	(503) 693-4	9/18/2013	9/30/2020	
404841	Vicki	Coscia	631 SE Rose St	Roseburg	OR	97470-4921	vickicoscia@MOBILE	(541) 672-4	2/1/2016	1/31/2021	
147371	Barbara	Craven	2659 Commercial St SE Ste 282	Salem	OR	97302-4381	barb@bart@MOBILE	(503) 399-0	4/23/1996	6/30/2021	
109825	Jeanne	Daniels	PO Box 69	Keno	OR	97627-0061	jeanne@je@MOBILE	(541) 273-4	4/6/1990	6/30/2021	
110163	Richard	Davey	151 SE 223rd Ave	Gresham	OR	97030-7481	rick@taxfir@MOBILE	(503) 666-1	1/26/2012	5/31/2021	
114090	Michael	Davidson	107 SW Hooker St	Portland	OR	97201-4721	michael@r@WORK	(503) 223-4	1/14/1994	6/30/2021	
310463	Evelyn	Davis	3828 SE Division St	Portland	OR	97202-1641	eve@inor@WORK	(503) 239-4	7/28/2012	7/31/2021	
241354	Joyce	Davis	20965 Limestone Ave	Bend	OR	97703-8931	shoobox@WORK	(541) 383-4	4/10/2006	6/30/2021	
243727	Diana	Day-Murphy	61396 S Highway 97 Ste 225	Bend	OR	97702-2151	diana@d-n@MOBILE	(541) 388-4	6/16/2006	6/30/2021	
310760	Wendy	DeMarce	116 NE Steiger St Ste B	Grants Pass	OR	97526-1311	wendy@pr@WORK	(541) 244-1	9/4/2012	8/31/2020	
411342	Jeffrey	Dillon	910 Oakway Dr	Coos Bay	OR	97420-1921	jeff.dillon@MOBILE	(619) 952-4	12/1/2018	11/30/2020	
241423	Kirkwood	Donavin	5778 Mica St	Springfield	OR	97478-8521	donavin@r@MOBILE	(541) 485-4	6/29/2006	6/30/2021	
106132	Janet	Dotson	1660 Williamette St	Eugene	OR	97401-4041	janetdot@MOBILE	(541) 343-4	6/29/2009	6/30/2021	
400392	Lorie	Eastlick	177 Alta Vista Rd.	Eagle Point	OR	97524-0181	lorie@elite@MOBILE	(541) 879-1	5/1/2014	4/30/2021	
310464	Patricia	Effingham	PO Box 538	Christmas	OR	97641-0531	peffingharr@MOBILE	(541) 576-2	7/28/2012	7/31/2021	
241503	Antonia	Estes	220 N G St	Lakeview	OR	97630-1411	jejei.logik@WORK	(541) 947-2	6/2/2006	6/30/2021	
241540	Cletus	Fernandez	2550 Market St NE	Salem	OR	97301-1571	cletusferna@WORK	(503) 588-4	5/14/2008	6/30/2021	
284981	Connie	Fox	10151 SW Barbur Blvd Ste 106	Portland	OR	97219-5951	connie@fo@MOBILE	(503) 246-4	9/13/2011	8/31/2020	
403068	Abigail	Frederick	1 SW Columbia St Ste 400	Portland	OR	97258-2001	abby@gani@MOBILE	(503) 227-1	6/1/2015	9/30/2020	
411736	Amy	Fuller	10524 SE Stark St Ste 100	Portland	OR	97216-2881	afuller@br@MOBILE	(503) 251-2	10/1/2019	9/30/2020	
239902	Joy	Gabel	PO Box 672 603 S Main St	Condon	OR	97823-0671	taxprobusil@MOBILE	(541) 384-4	6/1/2005	5/31/2021	

ORSEA

Member Roster

May 18, 2020

NAEA Id	First Name	Last Name	Address 1	City	State	Postal Cod	Email	Phone ty	Phone	Join Date	Expiration
240017	Madilyn	Gaoran	1934 Newmark St Ste A	North Bend	OR	97459-127	bnottaxt@WORK	WORK	(541) 756-7	6/20/2005	6/30/2021
405110	Angela	Garcia	13456 S Cayuse Ct	Molalla	OR	97038-950	angela@ar	MOBILE	(503) 804-7	4/1/2016	3/31/2021
113591	Gary	Gaska	33 NW 3rd St	Gresham	OR	97030-720	garygaska@MOBILE	MOBILE	(503) 666-7	8/2/1993	6/30/2021
104820	Bonnie	Gatlin	PO Box 461	Lincoln City	OR	97367-046	gatlinb15@WORK	MOBILE	(541) 996-6	1/6/1986	6/30/2021
413052	Angela	Gibson	4116 SE Harrison St	Milwaukie	OR	97222-586	kismyaxll	MOBILE	(503) 208-4	12/1/2019	11/30/2020
134846	Catherine	Giovinco	-	-	-	-	catygiovinc	-	-	10/26/1995	6/30/2021
101406	Susie	Gregory	1352 SE Cobb St	Roseburg	OR	97470-403	susieg9@MOBILE	MOBILE	(541) 673-1	6/1/1983	6/30/2021
246029	Irene	Gresick	4365 NW Queens Ave	Corvallis	OR	97330-322	igresick@c	WORK	(541) 752-4	10/8/2008	5/31/2021
241703	Stanley	Gresick	4365 NW Queens Ave	Corvallis	OR	97330-322	stan.gresic	MOBILE	(541) 752-4	8/18/2006	6/30/2021
166144	Jack	Griffin	5200 Meadows Rd Ste 150	Lake Oswego	OR	97035-006	jack@grift	MOBILE	(503) 697-6	1/20/1999	6/30/2021
412450	Kristine	Grimes	311 Mill St	Springfield	OR	97477-453	Kristine@r	MOBILE	(541) 744-2	2/1/2020	1/31/2021
266403	Krista	Haas	4409 S Stage Rd	Medford	OR	97501-940	taxbuck@y	WORK	(541) 772-6	5/19/2010	5/31/2021
407712	Theresa	Hamlin	PO Box 67	Myrtle Poi	OR	97458-006	theresa@a	MOBILE	(541) 572-5	4/1/2017	3/31/2021
412558	Anna	Handegard	PO Box 1089 216 7th St	Oregon Cit	OR	97045-008	anna@ajht	MOBILE	(971) 678-5	8/1/2019	7/31/2021
245005	David	Harmson	4038 N Interstate Ave	Portland	OR	97227-107	david@dca	MOBILE	(503) 238-0	1/24/2008	6/30/2021
261364	Dale	Haskin	15611 NE Glisan St	Portland	OR	97230-486	dalehaskin	WORK	(503) 252-5	9/9/2009	8/31/2020
404644	Tammy	Hastings	55 S 5th St	Central Poi	OR	97502-247	thastings@MOBILE	MOBILE	(541) 601-6	2/1/2016	1/31/2021
243930	Susan	High	45 82nd Dr Ste 55	Gladstone	OR	97027-256	shigh@clac	WORK	(503) 655-5	9/21/2006	6/30/2021
209296	Donna	Hines	568 NE Savannah Dr Ste 2	Bend	OR	97701-486	donna@bk	MOBILE	(541) 388-5	4/11/2002	6/30/2021
247251	Eileen	Hines	4931 SW 76th Avenue	Portland	OR	97225-180	siffman@c	MOBILE	(503) 539-1	2/26/2013	2/28/2021
166854	Melinda	Holberton	PO Box 55236	Portland	OR	97238-523	moetax01@MOBILE	MOBILE	(503) 805-5	6/1/2000	6/30/2021
111081	David	Hummel	285 NW 86th Ave	Portland	OR	97229-660	dthummel	WORK	(503) 292-2	5/23/1991	6/30/2021
101384	Patrick	Hurley	843 Alder Creek Dr Ste B	Medford	OR	97504-890	pat@hurle	MOBILE	(541) 774-1	5/9/2003	12/31/2020
404090	Michael	Imlah	6127 SW 161st Pl	Beaverton	OR	97007-400	implah@eas	MOBILE	(503) 332-0	8/1/2016	7/31/2021
210196	Marcello	Innocenti	2757 River Rd	Eugene	OR	97404-204	abtinc@c	MOBILE	(541) 689-7	10/9/2002	2/28/2021
413669	Kwongsum	Ip	11407 SW AMU St	Tualatin	OR	97062-688	pimash@g	MOBILE	(773) 982-5	4/1/2020	3/31/2021
406743	Bobbie	Jacobson	1140 NW Walnut Blvd	Corvallis	OR	97330-360	BooksandC	MOBILE	(541) 760-1	11/1/2017	10/31/2020
246754	Judy	Johnson	15675 SW Brasada Ranch Rd	Powell But	OR	97753	judy@bara	MOBILE	(503) 348-5	11/29/2009	11/30/2020
400245	Sheila	Johnson	873 Hillview Dr	Ashland	OR	97520-351	sheilaj104c	MOBILE	(541) 488-5	4/1/2014	3/31/2021
112431	Aleta	Johnson	28424 SE Highway 212	Boring	OR	97009-914	dera@tele	MOBILE	(503) 663-5	10/1/1992	6/30/2021
109598	Marilyn	Johnston	61 S 2nd St	Central Poi	OR	97502-220	mmts1040@MOBILE	MOBILE	(503) 664-5	12/22/1989	6/30/2021
112177	Carol	Jonasson	5729 Main St 219	Springfield	OR	97478	cmjonasson	WORK	(541) 341-4	6/26/1992	6/30/2021
404687	Gabrielle	Josephson	2164 NE Broadway St	Portland	OR	97232-151	gabriele@MOBILE	MOBILE	(503) 206-4	2/1/2016	1/31/2021
244629	Joyce	Kanoff	2294 Pacific Blvd SE	Albany	OR	97321-506	joyce.kano	WORK	(541) 928-6	9/13/2007	6/30/2021
212573	Roberta	Kinohi	9220 SW BARBUR BOULEVARD #304	Portland	OR	97219-542	roberta.g@WORK	WORK	(503) 477-5	7/30/2004	6/30/2021
121589	Larry	Kjelden	9013 NE Highway 99 Ste O	Vancouver	WA	98665-894	kjelden@a	MOBILE	(360) 576-6	11/27/1995	6/30/2021
246032	Rebecca	Klotz	PO Box 1885	Clackamas	OR	97015-188	designcorr	MOBILE	(503) 655-4	10/9/2008	3/31/2021
307962	Jean	Krieger	2268 NW Kearney St	Portland	OR	97210-301	kriegerjean	MOBILE	(949) 677-6	10/1/2019	9/30/2020
109939	Judith	Krussow	PO Box 424	Corbett	OR	97019-042	krussow@	MOBILE	(503) 313-5	5/11/1990	6/30/2021
243832	Florence	Lasswell	418 NW 5th St	Corvallis	OR	97330-641	lasswell@t	MOBILE	(541) 753-4	8/7/2006	6/30/2021
243744	Susan	Lauderdale	1307 NE 78th Street B12	Vancouver	WA	98665-967	susan@nw	MOBILE	(360) 694-8	6/28/2006	6/30/2021
292095	Gynthia	Lawson	21882 SW Chehalis St	Tualatin	OR	97062-903	cyrlawson	MOBILE	(503) 961-5	9/13/2011	8/31/2020
413577	Emily	LeBlanc	888 W Park St	Eugene	OR	97401-292	emily@ken	MOBILE	(541) 683-5	4/1/2020	3/31/2021
411437	Megan	Leisy	801 NE 28th Ave	Portland	OR	97232-240	megan@w	MOBILE	(971) 254-6	1/1/2019	12/31/2021
413497	Raymond	Leslie	15395 SE Bradford Rd	Clackamas	OR	97015-548	eataxman2	MOBILE	(503) 703-6	3/1/2020	2/28/2021

**ORSEA
Member Roster
May 18, 2020**

NAEA ID	First Name	Last Name	Address 1	City	State	Postal Cod	Email	Phone ty	Phone	Join Date	Expiration
265817	LaVerne	Lewis	3604 SE Powell Valley Rd Apt 324	Gresham	OR	97080-166	cronemagil@MOBILE	MOBILE	(503) 674-7	3/4/2010	5/31/2021
310092	Jeffrey	Linders	513 Main St Ste 101	Klamath Fa	OR	97601-605	jeff.linders@MOBILE	MOBILE	(541) 884-6	6/13/2012	5/31/2021
166265	Marie	Linders	513 Main St Ste 101	Klamath Fa	OR	97601-605	info@jms@WORK	WORK	(541) 884-6	6/1/1999	6/30/2021
164808	Mary	Lineberger	309 Court St	The Dalles	OR	97058-211	araxservice@MOBILE	MOBILE	(541) 298-2	8/26/2011	8/31/2020
293029	Katrina	Long	69 W Ash St	Lebanon	OR	97355-333	katrina.lnst@MOBILE	MOBILE	(541) 570-1	11/15/2013	10/31/2020
112396	Mary	Lunceford	PO Box 865	Molalla	OR	97038-086	mfb@mol@MOBILE	MOBILE	(503) 829-2	9/16/1992	6/30/2021
158623	Peter	Mar	PO Box 90	Alvadore	OR	97409-009	peter@hel@MOBILE	MOBILE	(541) 607-5	6/23/1998	6/30/2021
164875	Dale	Marino	1428 SE 20th Ave	Portland	OR	97214-381	d.c.marino@MOBILE	MOBILE	(503) 239-4	2/10/2003	6/30/2021
167142	Stuart	Martin	2112 Cove Ave	La Grande	OR	97850-390	taxman@e@MOBILE	MOBILE	(541) 963-4	1/31/2011	1/31/2021
405024	Holly	McCall	5311 SE Powell Blvd	Portland	OR	97206	info@mbsf@MOBILE	MOBILE	(503) 477-4	8/1/2017	7/31/2021
212777	Bill	McCracken	PO Box 2214	Oregon Cit	OR	97045-021	mrbill@mr@WORK	WORK	(503) 656-0	10/25/2004	6/30/2021
413530	Rochelle	McEvoy	843 Alder Creek Dr Ste B	Medford	OR	97504-890	rocky@hur@MOBILE	MOBILE	(541) 774-1	3/1/2020	2/28/2021
410420	M.	McKenzie	PO Box 157	Depee Bay	OR	97341-015	craig@gray@MOBILE	MOBILE	(541) 359-3	7/1/2018	12/31/2020
310041	Melody	McKenzie	PO Box 157 600 N Hwy 101	Depee Bay	OR	97341-015	taxes@gra@MOBILE	MOBILE	(541) 359-3	6/6/2012	5/31/2021
413535	Kimberly	Mendez	PO Box 7216	Springfield	OR	97475-001	mendezk@MOBILE	MOBILE	(541) 393-6	3/1/2020	2/28/2021
295034	Robert	Merriam	88216 Highway 42 S	Bandon	OR	97411-835-		MOBILE	(541) 347-1	5/3/2012	4/30/2021
106975	Raymond	Meyer	1233 SE 122nd Ave	Portland	OR	97233-120	ray@meye@MOBILE	MOBILE	(503) 253-1	6/9/1987	6/30/2021
266196	Peggy	Minter	24109 NE Holladay St	Wood Villa	OR	97060-290	peggy@mnt@MOBILE	MOBILE	(503) 661-6	5/3/2010	4/30/2021
309205	Helen	Morris	PO Box 2557	Battle Gro	WA	98604-255	taxrep@h@MOBILE	MOBILE	(360) 687-5	12/15/2011	11/30/2020
246531	Richard	Morris	7615 SW Lotus Blossom Pl	Beaverton	OR	97008-623	globaltrade@MOBILE	MOBILE	(503) 646-5	2/4/2009	1/31/2021
209015	Carol	Mulder	510 NW 14th St	Corvallis	OR	97330-591	mulderctax@MOBILE	MOBILE	(541) 430-2	12/13/2001	6/30/2021
311332	Jennifer	O'Halloran	9694 SW Siletz Dr	Tualatin	OR	97062-955	goldenledg@MOBILE	MOBILE	(503) 784-4	12/7/2012	11/30/2020
166850	Debra	Oglesby	263 E Historic Columbia River Hwy	Troutdale	OR	97080-208	dებიეგლე@MOBILE	MOBILE	(503) 666-6	6/1/2000	9/30/2020
412488	Yuliya	Olaru	14602 NE Fourth Plain Blvd Ste H	Vancouver	WA	98682-502	yuliya@ola@MOBILE	MOBILE	(360) 200-5	7/1/2019	6/30/2021
244478	Jay	Orand	3674 Lois Dr	Hood River	OR	97031-972	jaorand@g-		-	8/1/2007	6/30/2021
240507	Kenneth	Osterman	8810 SW Scoffins St	Tigard	OR	97223-622	ken@tigard@MOBILE	MOBILE	(503) 639-2	9/16/2005	6/30/2021
311857	Katie	Parker	2567 Game Farm Rd	Springfield	OR	97477-757	katie@all@MOBILE	MOBILE	(541) 686-5	3/21/2013	3/31/2021
210034	Carla	Pentkowski	1070 NW Murray Rd Ste 4	Portland	OR	97229-556	carla@cou@MOBILE	MOBILE	(503) 626-6	8/29/2002	6/30/2021
268118	Cynthia	Petersen	161 E Trower Creek Rd	Carmen	ID	83462	cpetersen@MOBILE	MOBILE	(541) 419-7	1/28/2011	1/31/2021
212848	Nicole	Piehl	888 W Park St	Eugene	OR	97401-292	nicole@ker@MOBILE	MOBILE	(541) 683-5	11/8/2004	6/30/2021
147263	David	Purkey	1905 NW 169th Pl Ste 220	Beaverton	OR	97006-730	dpurkey@f@MOBILE	MOBILE	(503) 614-6	3/18/1996	6/30/2021
213035	Michelle	Rasmussen	PO Box 627	Canby	OR	97013-062	michelle@j@MOBILE	MOBILE	(503) 263-4	2/28/2005	6/30/2021
166842	Shirley-Marie	Raven	33743 Molitor Hill Rd	Cottage Gr	OR	97424-944	smraven@n@MOBILE	MOBILE	(541) 767-0	5/31/2000	6/30/2021
311259	Cynthia	Rawlinson	2915 Portland Rd	Newberg	OR	97132-197	cyndy.rawl@WORK	WORK	(503) 487-6	12/19/2012	10/31/2020
313781	Marluz	Reyes De Stearns	181 N Grant St Ste 202	Canby	OR	97013-360	marluzstee@MOBILE	MOBILE	(503) 428-1	12/27/2013	7/31/2021
113978	Jean	Robins	10157 SW Barbur Blvd Ste 106C	Portland	OR	97219-591	jeanrlc@c@MOBILE	MOBILE	(971) 302-7	4/29/2009	4/30/2021
242926	Louis	Roner	78120 Highway 99	Cottage Gr	OR	97424-936	louis@taxs@MOBILE	MOBILE	(541) 942-6	6/23/2006	6/30/2021
167506	Ira	Rosenberg	530 NW Battaglia Ave	Gresham	OR	97030-524	iratax@fro@MOBILE	MOBILE	(503) 661-6	3/28/2001	6/30/2021
245952	Annette	Saarienen	8050 SW Pfaffle St Ste 110	Tigard	OR	97223-675	annettes@MOBILE	MOBILE	(503) 691-1	9/30/2008	9/30/2020
402108	Linda	Santee	8543 NE Broadway	Portland	OR	97220-562	lmsanteeta@MOBILE	MOBILE	(503) 421-6	2/1/2015	10/31/2021
412981	JACOB	Savage	851 N Winchell St	Portland	OR	97217-114	jsavage_79@MOBILE	MOBILE	(503) 286-1	11/1/2019	10/31/2020
265333	Jerr	Schmidt	15405 SW 116th Ave Ste 202	King City	OR	97224-410	jjerr@your@MOBILE	MOBILE	(503) 601-4	10/30/2009	10/31/2020
412561	REBECCA	SCHULZ	PO Box 416	Gold Hill	OR	97525-041	REBECCA@MOBILE	MOBILE	(541) 857-2	8/1/2019	7/31/2021
147265	Monica	Scrup	PO Box 97	Warrenton	OR	97146-009	monica@r@MOBILE	MOBILE	(503) 861-3	3/18/1996	6/30/2021
244877	Russell	Shaver	17525 SE Decker Rd	Boring	OR	97009-851	russ@tctsil@WORK	WORK	(503) 558-5	11/16/2007	6/30/2021

ORSEA
Member Roster
May 18, 2020

NAEA ID	First Name	Last Name	Address 1	City	State	Postal Cod	Email	Phone ty	Phone	Join Date	Expiration
113616	Carol	Smith	406 High St	Silverton	OR	97381-171	carol@carc	MOBILE	(503) 873-6	8/10/1993	9/30/2020
136122	Douglas	Snyder	9011 SW Beaverton Hillsdale Hwy Ste 1A	Portland	OR	97225-245	doug@sny	MOBILE	(503) 297-2	3/22/1995	6/30/2021
412400	Katie	St. Ores	435 NE Evans St	McMinnvill	OR	97128	info@saint	MOBILE	(971) 279-7	7/1/2019	6/30/2021
245310	Daniel	Stearns	181 N Grant St Ste 202	Canby	OR	97013-360	danielstear	MOBILE	(503) 428-1	5/22/2008	6/30/2021
312446	David	Strubhar	8855 SW Holly Ln Ste 118	Wilsonville	OR	97070-879	d_strubhar	MOBILE	(503) 989-2	6/4/2013	11/30/2020
245261	Jane	Supnet	2669 NE Twin Knolls Dr Ste 106	Bend	OR	97701-489	jsupnet@a	MOBILE	(541) 388-2	5/7/2008	12/31/2020
412142	Jean	Thomas	3411 Country Club Dr S	Salem	OR	97302-974	joanmthom	MOBILE	(303) 912-5	5/1/2019	4/30/2021
405131	Donald	Thorn	33838 E River Dr Unit 43	Creswell	OR	97426-932	thorn4951	MOBILE	(541) 895-3	4/1/2016	3/31/2021
304369	Christine	Todd	11821 SW Morning Hill Dr	Tigard	OR	97223-188	taximeser	MOBILE	(503) 524-3	2/8/2012	11/30/2020
304427	Melodie	Tooley	213 Madrona Ave SE	Salem	OR	97302-460	mtoolley@	MOBILE	503-585-44	8/8/2012	7/31/2021
408060	T.	Twombly	18522 SE Abernethy Ln	Milwaukie	OR	97267-670	atwombly@	MOBILE	(503) 333-7	5/1/2017	4/30/2021
167914	Charlene	Van Cleef	-	-	-	-	cvancleef@	WORK	(503) 646-4	6/21/2001	6/30/2021
310719	Dorothy	Walsh	663 A St	Ashland	OR	97520-207	walsh_dor	MOBILE	(541) 482-4	8/1/2011	9/30/2020
166587	Russell	Ward	13420 NE Fox Hollow Ln	Newberg	OR	97132-645	russkward@	MOBILE	(503) 704-2	2/4/2000	6/30/2021
310466	Carol	Wild	8885 SW Canyon Rd Ste 133	Portland	OR	97225-345	carolwild@	MOBILE	(503) 267-4	7/28/2012	7/31/2021
109796	Kurt	Williams	21356 Hubbard Cutoff Rd NE Unit 50	Aurora	OR	97002-840	kurt@corn	MOBILE	(503) 678-5	3/30/1990	6/30/2021
210174	Laurie	Wright	2650 Frontage Rd	Reedsport	OR	97467-181	parkside@	MOBILE	(541) 271-5	10/2/2002	6/30/2021
307243	Chizuko	Yamakawa	4-8-3 Jyomyoji, Kamakura-shi	Kanagawa	JPN	248-0003	chi.yama@	MOBILE	81-467-23-7	10/15/2011	9/30/2020
137266	Hyong	Yu	811 E Burnside St Ste 219	Portland	OR	97214-123	hntaxservic	MOBILE	(503) 235-7	9/11/1995	6/30/2021
147139	Heidemarie	Zepf	23005 Varney Creek Rd	Klamath Fa	OR	97601-851	heidizepf@	MOBILE	(310) 789-5	5/1/2017	6/30/2021

ORSEA
New Members
2019-2020

NAEA Id	First Name	Last Name	Status Cd	Member Type	Address 1	City	State	Postal Code	Email	Phone	Join Date
411736	Amy	Fuller	ACTIVE	New Affiliate	10524 SE Stark St Ste 100	Portland	OR	97216-2882	afuller@bridgectytax.com	(503) 251-2100	10/1/2019
307962	Jean	Krieger	ACTIVE	Affiliate	2268 NW Kearney St	Portland	OR	97210-3014	kriegerjean@gmail.com	(949) 677-8301	10/1/2019
412981	JACOB	SAVAGE	ACTIVE	New Affiliate	851 N Winchell St	Portland	OR	97217-1141	jsavage_793@msn.com	(503) 286-1561	11/1/2019
413078	Dawn	Buxton	ACTIVE	New Affiliate	-	-	-	-	dawn@buxtoneallc.com	(541) 999-4747	12/1/2019
413052	Angela	Gibson	ACTIVE	New Affiliate	4116 SE Harrison St	Milwaukie	OR	97222-5860	kissmytaxllc@gmail.com	(503) 208-4231	12/1/2019
412450	Kristine	Grimes	ACTIVE	New Affiliate	311 Mill St	Springfield	OR	97477-4535	kristine@mittleider.com	(541) 744-2727	2/1/2020
413497	Raymond	Leslie	ACTIVE	New Affiliate	15395 SE Bradford Rd	Clackamas	OR	97015-5486	eastaxman2@gmail.com	(503) 703-8478	3/1/2020
413530	Rochelle	McEvoy	ACTIVE	New Affiliate	843 Alder Creek Dr Ste B	Medford	OR	97504-8904	rocky@hurleystax.com	(541) 774-1040	3/1/2020
413535	Kimberly	Mendez	ACTIVE	New Affiliate	PO Box 7216	Springfield	OR	97475-0010	mendezk@mendextaxservices.com	(541) 393-8765	3/1/2020
413669	Kwongsum	Ip	SUSPENDE	New Affiliate	11407 SW AMUJ St	Tualatin	OR	97062-6884	pimas8@gmail.com	(773) 982-9398	4/1/2020
413577	Emily	LeBlanc	ACTIVE	New Affiliate	888 W Park St	Eugene	OR	97401-2929	emily@kentandersonlaw.com	(541) 683-5100	4/1/2020

ORSEA
Terminated Members
As of May 18, 2020

First Name	Last Name	Address 1	City	State	Postal Code	Phone	Email	Join Date	Expiration	Paid Thru Date	Termination Date	Term Reason	Status Cd
Michael	Adriano	61419 S Highway 97 Ste G	Bend	OR	97702-2182	(541) 389-1343	notaxman@gwstoffice.net	10/24/1997	6/30/2019	6/30/2019	10/2/2019	Did not pay invoice	TERMINATED
Cynthia	Conrad	862 NW Halekaha Way	Bend	OR	97703-6726	(724) 357-0677	conrad@conradaccounting.com	1/1/2018	6/30/2019	6/30/2019	10/2/2019	Did not pay invoice	TERMINATED
Susan	Girouard	-	-	-	-	-	susing104@gmail.com	2/11/2008	6/30/2019	6/30/2019	10/2/2019	Did not pay invoice	TERMINATED
Ree	Howe	PO Box 885	Clatsamas	OR	97015-0885	(503) 699-7513	rehowe@earthlink.net	7/2/2012	6/30/2019	6/30/2019	10/2/2019	Did not pay invoice	TERMINATED
Deniel	Kluzka	PO Box 2109	Winston	OR	97496-2109	(541) 678-8188	tax@weststarangeinc.com	11/9/1995	6/30/2019	6/30/2019	10/2/2019	Did not pay invoice	TERMINATED
Mary	Sabin	4705 Millcrest Rd	Medford	OR	97504-9606	(541) 282-5915	tax@hdymannc1@aol.com	10/29/1996	6/30/2019	6/30/2019	10/2/2019	Did not pay invoice	TERMINATED
Beverly	Stone	24005 NE Oregon St	Wood Village	OR	97060-2910	(503) 665-2340	beystone2@comcast.net	9/11/1988	6/30/2019	6/30/2019	10/2/2019	Did not pay invoice	TERMINATED
Shigeva	Kikuchi	2080 SE Oak Grove Blvd., Ste 15	Portland	OR	97267-2657	(503) 707-4559	tax_mstetst@northall.com	10/2/2008	9/30/2019	9/30/2019	10/2/2019	Did not pay invoice	TERMINATED
Justin	Battiller	244 S Grape St	Medford	OR	97501-3124	(541) 245-8882	battiller@orangea.com	7/8/2011	7/31/2019	7/31/2019	10/2/2019	Auto-Expire	TERMINATED
Tonia	Miller	-	-	-	-	-	toniamiller@elrebookkeepingtaxsolutions.com	8/1/2018	7/31/2019	7/31/2019	10/30/2019	Did not pay invoice	TERMINATED
Mark	Sharp	818 SW Third Ave #221-1228	Portland	OR	97204-2405	(800) 622-1035	mark@financialplanningdoreign.com	2/1/2018	7/31/2019	7/31/2019	10/30/2019	Did not pay invoice	TERMINATED
Alana	Byington	606 SE 117th Ave	Vancouver	WA	98685-5283	(360) 356-3818	albjwest@northall.com	8/21/2009	8/31/2019	8/31/2019	12/2/2019	Did not pay invoice	TERMINATED
Scott	Hannigan	716 SE 69th Ave	Portland	OR	97215-2116	(503) 226-2140	shannigan@comcast.net	9/2/2009	8/31/2019	8/31/2019	12/2/2019	Did not pay invoice	TERMINATED
Gretchen	McBury	PO Box 583	Westliss	OR	97067-0583	(503) 622-4384	gretchen@galpinnaclecounting.com	9/15/2009	8/31/2019	8/31/2019	12/2/2019	Did not pay invoice	TERMINATED
Diane	Pallas	11280 SW 91st Ct	Tigard	OR	97223-6475	(503) 736-3869	diane@dieneepallas.com	8/25/2008	8/31/2019	8/31/2019	12/2/2019	Did not pay invoice	TERMINATED
Robin	Vina	882 NE 7th St	Grants Pass	OR	97526-1635	(541) 479-4710	robv@reign.com	9/20/2011	9/30/2019	9/30/2019	1/1/2020	Did not pay invoice	TERMINATED
Ruth	Gunn	882 NE 7th St	Grants Pass	OR	97526-1635	(541) 479-4710	ruth@cedarconrtax.com	9/20/2011	9/30/2019	9/30/2019	1/1/2020	Did not pay invoice	TERMINATED
Judith	Smith	4800 Meadows Rd Ste 200	Lake Oswego	OR	97035-4793	(571) 344-1664	jsmith@hw.com	11/1/2008	10/31/2019	10/31/2019	2/8/2020	Did not pay invoice	TERMINATED
Hidekaki	Yamakawa	4-8-3 NEMYOJI	Kamakura City	JP	248-0003	81-457-23-8213	maineconusa@yahoo.co.jp	11/1/2011	10/31/2019	10/31/2019	2/8/2020	Did not pay invoice	TERMINATED
George	Boomer	4165 SW West Hills Rd	Corvallis	OR	97333-3928	(541) 746-2345	gboomer78@gmail.com	12/1/2016	11/30/2019	11/30/2019	2/27/2020	Did not pay invoice	TERMINATED
Colleen	Mincinski	PO Box 1887	Corvallis	OR	97339-1887	(541) 760-7025	cmncinski@comcast.net	4/1/2016	11/30/2019	11/30/2019	2/27/2020	Did not pay invoice	TERMINATED
Steven	Moore	PO Box 117	Alsea	OR	97324-0117	(541) 929-6060	steve@philomathtax.com	8/4/2011	11/30/2019	11/30/2019	2/27/2020	Did not pay invoice	TERMINATED
Sharon	Brenier	4130 SW 117th Ave # A254	Beverton	OR	97005-5666	(503) 577-9248	skbrenier@gmail.com	12/29/2008	12/31/2019	12/31/2019	4/10/2020	Did not pay invoice	TERMINATED
Myra	Villola	324 Avery St	Ashland	OR	97520-3903	(541) 822-5596	my.villola@gmail.com	1/1/2019	12/31/2019	12/31/2019	4/10/2020	Did not pay invoice	TERMINATED
Deborah	Brown	5200 Meadows Rd Ste 150	Lake Oswego	OR	97035-0066	(503) 680-4080	debbi@allproaccounting.com	2/3/2012	1/31/2020	1/31/2020	5/1/2020	Did not pay invoice	TERMINATED
Rhoda	Harader	348 Indusry St	Astoria	OR	97103-6308	(503) 325-8297	ate@seasurf.net	7/29/2006	1/31/2020	1/31/2020	5/1/2020	Did not pay invoice	TERMINATED
Theresa	Hanlin	PO Box 67	Myrtle Point	OR	97458-0067	(541) 572-5366	theresa@aldenhanlin.com	4/1/2017	3/31/2021	3/31/2020	-	Did not pay invoice	SUSPENDED
Kwongsum	Ip	11407 SW AMU St	Tualatin	OR	97062-6884	(773) 982-9398	plma88@gmail.com	4/1/2020	3/31/2021	-	-	Did not pay invoice	SUSPENDED
Shelia	Johnson	873 Hillview Dr	Ashland	OR	97520-3517	(541) 488-3352	shelia1040@gmail.com	4/1/2014	3/31/2021	3/31/2020	-	Did not pay invoice	SUSPENDED

President's report for May 18, 2020 Board Meeting:

- A. NAEA/NTPI 2020 CONFERENCE has officially been cancelled by National for this year at Scottsdale, AZ.

B.

Getting into the 21st Century:

It is interesting that in my President's Speech when I took office, I stated that I wanted ORSEA to come into the 21st Century.

Little did I know that 2020 was going to be the Year that rocked our Entire World!

With this PANDEMIC, it has crippled our way of Life, unlike anything in History! Because it has effected EVERYTHING we Do, even people on the other side of the Globe. For some it has been a life restricting Fear and for others it has just fueled more division in our country, even among friends and family members. However, it has ALSO most importantly brought out the VERY BEST IN HUMANITY ACROSS THE GLOBE and especially in our country! I've watched countless people supporting the Health workers, including the Janitors of those hospitals, Garbage workers, Mail personnel, Teachers, and many others.

This has nearly destroyed our Country's economy and the lives lost from this virus are equally devastating to those families.

I had no idea in January that this would impact our 2020 CONFERENCE and force us to use an INTERNET tool (ZOOM) to conduct our MEETINGS virtually and not in person.

It is rather ironic that this Virus has forced ALL of us to explore New ways of doing business with our clients, our colleagues, our families, and the manner in which we conduct our lives.

- C. Covid 19 effects on ORSEA and Our Hood River Conference will be discussed with top priority.
- D. 2020 Election of Officers for July 2020 thru June 2021, needs to also be discussed if we cancel this year's Conference, because we still need to abide by our By Laws and elect officers, since NAEA did that as well. Therefore, this will have to be figured out to VOTE on our WEBSITE by the membership after we POST the Slate of Officers on our Website.
- E. GOALS and ideas WILL BE DISCUSSED during this VIRTUAL BOARD MEETING and further discussed in JULY 2020 BOARD MEETING (whether by Virtual meeting again or at the CONFERENCE. Either way we can't take the time to do a thorough job today at this meeting like we normally do.

ORSEA

OREGON SOCIETY
OF ENROLLED AGENTS

POWERING AMERICA'S TAX EXPERTS

To: ORSEA Board Members

From: Chair, Nicole Piehl

Subject: Education for Spring 2020 Conference and General Issues

Date: May 18, 2020

Spring 2020 Conference:

1. Speakers still planning to attend (Frank has changed his airline ticket)
 - a. Mark Pierce, May 19, 2020, for 6 Hours
 - b. Frank Degan, May 20, 2020 for 6 Hours and May 21, 2020 for 2 Hours
 - c. Joyce and Daryl Davis, May 21, 2020 for 4 Hours

2. Topics
 - a. Mark will be speaking on S-Corps including basis issues, NOLs, and balance sheets. I am going to have him spend some time on shareholder loans to the corporation with regard to paying them back.

 - b. Frank gave me a list of 6 possible topics for his 4 slots (each slot = 2 hours). The board has decided on the following topics.
 - i. Topic 1: Substantial Authority (2 ethics credits)
 - ii. Topic 2: Defending a Form 1040 (With help from the Tax Court) (2 credits)
 - iii. Topic 3: The IRM: A Look at IRS Policies (2 credits)
 - iv. Topic 4: TCJA §199A and More – Questions from the Field (Frank said that he could cover some of the CARES act in this session) (2 credits)

 - c. Joyce and Daryl Davis will have two sessions (2 credits each). The first will be taught by Joyce and is called "Safeguarding your Tax Office, The Beginning". Joyce says that "This is hands-on writing of an introductory IT and Data Breach response plan for a tax office from a template. General overview of other office policies and plans using a general guide. Staff onboarding and training. Best practices for daily computer safety including email encryption using ShareFile. Facility security requirements and suggestions, and limited discussion of PCI compliance.". The second session will be taught by Daryl Davis and is called "Safeguarding

Your Tax Office, The Technology". Joyce describes this as a session in which "we will learn about monitoring and securing your office computers and systems. We will discuss VPN's, wired and Wi-Fi networks, routers and firewalls, multifactor and two factor authentication, windows remote desktop, backup planning, hard drive encryption, and other topics."

3. Costs (same estimate as I had from January):

- a. Frank Degan: approximately \$3,800.00 inclusive of speaker fees (\$325.00/hour), transportation, lodging, etc.;
- b. Mark Pierce: approximately \$1,290.00 inclusive of speaker fees (\$200.00/hour) and mileage reimbursement;
- c. Joyce & Daryl Davis: approximately \$900.00 inclusive of speaker fees (\$150.00/hour) and mileage reimbursement.

4. Tentative Schedule:

- a. Tuesday: Mark for the first 6 hours and? for the last 2 hours;
- b. Wednesday: Frank for the first 6 hours and ? for 1 or 2 hours; and
- c. Thursday: Frank for the first 2 hours and Joyce & Daryl for the last 4 hours.

General Notes:

1. Dennie will not be able to speak at the conference due to health reasons. This means that we have some time slots to fill if the conference does take place. I personally think that we should have some education on the CARES act and PPP loan forgiveness as it stands at that point (who knows, maybe the SBA will have finally issued final regs. that Congress agrees with??); and
2. NAEA has noted in their newsletter that they can help with virtual conferences and classes. I do not know how much work this would be, but in light of Covid, this might be an option.

2020 Conference Report - Hood River May 19 - 21

Breakfast each day is the NW Continental--\$15 per person

Morning Break is just Coffee, tea and water, charged by the gallon

Lunch

Tuesday Mexican Fiesta \$25 per person

Wednesday Soup and Salad Bar \$21 per person

Thursday--either premade sandwiches (\$17 per person) or Build your own (\$19 per person)

Afternoon Break--coffee, tea, water and Lunch Dessert

Dinner--create your own buffet \$39 per person with 2 entrees

Look through the options, but I think entree one should be either Chicken Piccata or Pork Loin and entree 2 should be the stuffed Portobello

warm sides--roasted vegetables and orzo pasta

chilled side-- mixed garden greens

desert--fruit tartlets with lemon curd

Anne