

Oregon Society of Enrolled Agents
Board of Directors Zoom Meeting

October 23, 2020

Agenda attached.

Meeting called to order by President Maddy Gairan at 12:05 pm.

Mission statement was read by Secretary Barbara Craven.

There were enough present for a quorum. Verbal attendance was taken . Sheet attached.

Those attending were to e-mail secretary a signature sheet. Only signature received was from Sue Bladorn. Attached.

Proxy was received from Carol Wild. Attached

Maria Arbuckle submitted e-mail that she would not be in attendance for the meeting.

Minutes for the August 7, 2020 Board Meeting were not read but Michael Davidson moved they be approved at posted on website. Eve Davis seconded. Motion passed.

Treasurer's Report:

June Brock – Profit & Loss and Balance Sheets attached

President's Report:

Maddy Gairan – Report attached.

Vice President's Report:

Eve Davis – Report attached.

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 – Report attached. NAEA report also attached.

Education Report – Nicole Piehl

Nicole reminded Daniel Stearns she needed outline for upcoming November 6th OrSEA Education Day covering 2 Hours on Collections from 10 a.m. till noon so she could obtain IRS program number. Decided there would be no cost to members or non-members.

Annual Conferences:

Committee formed to check on how to proceed with virtual education to replace conferences. Meeting set for November 13th at 10 a.m. consisting of Carol Wild, Nicole Piehl, Daniel Stearns, Ira Rosenberg, Ann Burgess, Joyce Davis and Michael Davidson. They will report back to board at December 4th board meeting with ideas. Joyce Davis suggested to offer virtual education spread over multiple days and in 4 hour sections.

Committee Reports:

Membership: Maria Arbuckle – We have 155 current members. List attached.

By-Laws/Legislative: Daniel Stearns – Not much happening now so lobbyist is not very active.

Communications/Website:

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

Ira Rosenberg – Newsletter: Going good.

Historian/Policies & Procedures/Scholarship & Awards: Susan Bladorn – All on one report. Attached. Maddy Gairan and Sue Bladorn will have a 10 a.m. phone call meeting on November 13th to discuss scholarships and awards.

Government Relations: Michael Davidson & Carol Wild – IRS Practitioners Forum set for October 30th using virtual media.

Nominating Committee Report: Nomination slate of officers attached. Voting will take place at Annual General Meeting being held at 2 p.m. today.

New Business:

Maddy Gairan will reach out to MN on their legal issues and will e-mail board on what she finds out.

Next Board Meeting: December 4, 2020 at Noon by Zoom

Meeting adjourned at 1:50 p.m. by President Maddy Gairan to prepare for the Annual General Meeting starting at 2 p.m.

Respectfully Submitted,
Barbara J. Craven, Secretary

OREGON SOCIETY OF ENROLLED AGENTS BOARD OF DIRECTORS' MEETING

Friday: OCTOBER 23, 2020 at NOON (Eat lunch before our meeting, please.)

SIGN into ZOOM MEETING a half earlier than noon if you'd like to "visit" before meeting.

Noon: Call to Order. Welcome any "members" joining us by Zoom!

1. **Read OrSEA Mission Statement, Secretary, Barbara Craven**
2. **PLEASE SIGN IN for THIS MEETING and notify Barbara of your presence on Zoom, please allow "video" presence so she can take roll call! Meeting is being Recorded by Zoom!**
3. **Check for quorum. (Barbara Craven)**
 - a. **Roll call, email your signature with Oct. 23rd date on it, if you plan to attend the meeting.**
 - b. **Email Barbara any Proxies, if you cannot attend, Please!**
4. **Review/Approve Aug. 7, 2020 Virtual Board Meeting Minutes – Barbara Craven. (POST on Website and emailed to each board member)**
5. **Treasurer's Report: June Brock (POST on Website and emailed to each board member)**
6. **President's Report: Maddy Gairan, EA (Post on Website & emailed to each board member)**
7. **Vice President's Report: Evelyn Davis – NAEA Affiliate Council meeting**
8. **Directors' Reports: (Are there Any Virtual classes offered for Chapters?)**
 - a. **North Directors— Michael Davidson and Anne Burgess**
 - b. **Central Directors— Joyce Davis and Kirkwood Donavin**
 - c. **South Directors – Susan Bladorn & Marie Linders**
9. **Education- Nicole Piehl - IDEAS for Nicole for Virtual classes for 2020!**
10. **Annual Conferences:**
 - i. **2020: ZOOM CLASS ON NOV. 6, 2020 (Daniel Stearns speaker)**
TOPIC: Representation
 - ii. **2021- Hood River- Anne Burgess and Ira Rosenberg**
 - iii. **2022- ??????- (Need to change from Bend to a different venue)**
 - iv. **2023- Klamath Falls - Marie Linders**
 - v. **2024- ????????? (Any ideas???)**

11. Committee Reports please EMAIL ALL REPORTS to each Board member before the meeting
 - a. (We aren't taking the time to go through these because of time allotted):

12. Nominating - Daniel Stearns, Past President (read the Slate of Officers up for Election☺)
 - a. VOTING on New Officers during Annual Membership meeting at 2 pm

 - b. Membership – Maria Arbuckle (how many members currently?)
 - c. By Laws / Legislative – Daniel Stearns
 - d. Communications/Website: = Daniel Stearns
 - e. Government Relations – Michael Davidson and Carol Wild
 - i. (Virtual IRS PRACTITIONERS FORUM coming up Oct. 30, 2020)
 - f. Policies and Procedures: Sue Bladorn
 - g. Historian- Sue Bladorn – (Send any photos to Sue or Daniel to be uploaded to our website from past Conferences.)
 - h. Scholarships and Awards: Sue Bladorn and Carol Wild (Tabled until next year)

13. New and/or Pending Business/ Good of the Order:
 - a. 2020 ZOOM ORSEA CLASS with Daniel Stearns on Nov. 6, 2020.
 - i. Do you want a Round Table or Representation?
 - b. December 11, 2020 next Zoom BOARD meeting!
 - c. MAY 2021 BOARD MEETING will hopefully
be In Person at the CONFERENCE IN HOOD RIVER, unless we have to have it Virtual!

14. Adjourn by 1:50 pm.

THANK YOU ALL FOR PARTICIPATING IN THESE ZOOM MEETINGS! I TRULY APPRECIATE ALL OF YOU AND MISS SEEING YOU ALL IN PERSON!

THANK THE LORD FOR TECHNOLOGY, WHICH GIVES US A CHANCE TO STILL CONDUCT OUR MEETINGS AND OUR BUSINESSES!

I AM THANKFUL WE HAVE TAX SEASON 2020 BEHIND US NOW. I HOPE YOU HAD A GOOD SUMMER AND I HOPE TO SEE YOU ALL IN PERSON IN MAY 2021 FOR OUR CONFERENCE AT HOOD RIVER (IF GOVERNMENT PERMITS US)!

PRAY FOR OUR NATION. PRAY FOR GOVERNMENT OFFICIALS OF ALL PARTIES TO BE UNITED AND HELP OUR FELLOW AMERICANS; OUR SMALL and LARGE BUSINESSES GET BACK ON THEIR FEET AGAIN!

REMEMBER TO VOTE IN NOVEMBER!

SIGN IN SHEET

(verbal check in)

Board Meeting OCT. 23, 2020

MEETING BY ZOOM @ 12:05 p.m.

Maria Arbuckle	<u>Absent</u>
Sue Bladorn	<u>Here</u>
June Brock	<u>Here</u>
Anne Burgess	<u>Here</u>
Barbara Craven	<u>Here</u>
Michael Davidson	<u>Here</u>
Evelyn Davis – V. President	<u>Here</u>
Joyce Davis	<u>Here</u>
Kirkwood Donavin	<u>Absent</u>
Maddy Gaoiran - President	<u>Here</u>
Marie Linders	<u>Absent</u>
Nicole Piehl	<u>Here</u>
Ira Rosenberg	<u>Here</u>
Daniel Stearns – Past Pres.	<u>Here</u>
Carol Wild	<u>Late -Here</u>
Catherine Giovinco	<u>Here</u>
	<u> </u>

I ATTENDED THE ZOOM MEETING OF ORSEA TODAY 10/23/20

SUSAN BLADORN

Susan Bladorn



barb@barbsbookandtax.com

From: Carol Wild <carolwild1040@gmail.com>
Sent: Friday, October 23, 2020 10:56 AM
To: Barb Craven; Bnottax
Subject: Proxy vote

Barb,
I gave my proxy vote to Michael.
I hope to join late, but am not certain.
Best to all,

Thanks,

Carol M. Wild, EA, LTC 29891-C
8885 SW Canyon Road, Suite 133
Portland, OR 97225
CarolWild1040@gmail.com
503.267.6126 cell

barb@barbsbookandtax.com

From: Maria Arbuckle <marbuckle87840@gmail.com>
Sent: Thursday, October 22, 2020 10:09 AM
To: barb@barbsbookandtax.com
Subject: Out of the Office Re: minutes

We our out of town and the office is closed until our return on October 23rd.

All current clients I will respond to your emails within 48hrs. If it is an something that needs immediate attention, please call me on my cell phone.

Thank you and be safe,

--
Maria T Arbuckle, EA, LTC, NTPI, CMCA, AMS
875 Idylwood Dr SE
PO Box 3155
Salem, OR 97302

503-485-1983 Office
503-967-7559 Fax

5:07 PM
10/22/20
Cash Basis

Oregon Society of Enrolled Agents
Profit & Loss
July 2020 through June 2021

	<u>Jul '20 - Jun 21</u>
Income	
Dues	
Dues - Renewals	2,093.00
Total Dues	2,093.00
Miscellaneous Income	75.00
Total Income	2,168.00
Expense	
Education Expenses	93.75
lobbying	900.00
Total Expense	993.75
Net Income	<u><u>1,174.25</u></u>

5:10 PM
10/22/20
Cash Basis

Oregon Society of Enrolled Agents
Balance Sheet
As of October 22, 2020

	<u>Oct 22, 20</u>
ASSETS	
Current Assets	
Checking/Savings	
Umpqua Checking	21,466.86
Total Checking/Savings	<u>21,466.86</u>
Total Current Assets	<u>21,466.86</u>
TOTAL ASSETS	<u><u>21,466.86</u></u>
LIABILITIES & EQUITY	
Equity	
Restricted Funds	
Restricted Education Funds	
Restricted Fund - Education	4,928.81
Total Restricted Education Funds	<u>4,928.81</u>
Restricted Funds Lobbing	510.00
Total Restricted Funds	<u>5,438.81</u>
RET Fund Balance	16,808.57
Retained Earnings	-1,954.77
Net Income	<u>1,174.25</u>
Total Equity	<u>21,466.86</u>
TOTAL LIABILITIES & EQUITY	<u><u>21,466.86</u></u>

ORSEA OCTOBER PRESIDENT'S REPORT:

Well this has definitely been an adventurous tax season, to say the least. I hope you all survived. I know many of our small business clients did not and some actually did ok and are still in business with their modifications from Covid 19 changes to stay in business.

I know many of you were disappointed that we did not have our Annual Conference in May 2020 at Hood River that we were hoping to have. However, at this time, we would like your feed back as to going forward with our education for our Chapter meetings, as well as venues that you may know of for future Conferences that allow for "social distancing", etc. And any speakers that you may also know of to pass along to our Education Chairperson: Nicole Piehl.

I did send out an invitation to all members to attend the ZOOM Annual Membership meeting this Friday, Oct. 23rd to vote for our New Officers and also give us ideas and any thoughts going forward to improve upon OrSEA for our members.

Thank you ALL for sticking with us this year.

I have attached to this report; an excerpt from a Newsletter I received from Bob Jennings, CPA/EA; as 'THE TAX SPEAKER'. Bob Jennings is an excellent speaker and extremely knowledgeable in tax laws and how to run a successful tax office. I felt he has some good advice for all of us to take into consideration, especially after this last tax season. I hope it helps. If not, you can ignore it or pass it on.

Sincerely,

Maddy Gaoiran, EA; OrSEA President

The "Prime Directive" of the Tax Professional

(We all have two things to sell or offer to clients: Our knowledge and confidentiality. We shall not give either one away.) revised a little by Maddy Gaoiran, EA

20 Mantras in running a Tax Office:

1. *It will never get better if you don't change something;*
2. It is your name on the door, not the clients;
3. Never hesitate to fire a client;
4. No client or job is more important than your family;
5. You rarely lose a client you don't deserve to lose;
6. Don't judge your competition by their work;
7. You cannot charge too much, but you can provide too little service;
8. End every single meeting with advice;
9. If you don't get rid of the problem clients, you can't replace them with good clients;
10. Never ask an employee to do something you are not willing to do;
11. A disorganized client will never become organized-*send them away!*
12. Admit your mistakes, fix the problem, and move on;
13. You can't "Bend" ethics rules, you can only break them;
14. What we spent last year is unimportant, what we can make next year is important;
15. Good drivers look well beyond the car in front of them, good practices look well into the future too;
16. Always treat your employees with courtesy and respect because they are reflections of the firm;
17. Firm profitability is not based on how many clients you have, but rather, how many clients are paying you what you are worth;
18. You can't buy more time; you can only work more efficiently;
19. A client whose first question is about fees should never become a client;
20. Your brain has 60-70 hours per week of usefulness, change something if you are spending more than that!

This was from an Enrolled Agent in Indiana; Bob Jennings via his Newsletter from his business: "TAX SPEAKER"! This seemed to be very Valuable information for all of us to take into consideration after this 2020 TAX SEASON! I hope it encourages you to make some changes if need be.

Maddy Gaoiran, EA, OrSEA President

Vice Presidents Report 10/23/2020

I participated in the NAEA Affiliate Council meeting on September 22nd, 2020. Our affiliate leader is Jeff Augenstein. The main topics of discussion were how to do continuing education online. Members in Colorado said they have done some small webinars through a platform on Zoom. For a small monthly fee, they do the required polling. It was stated that Zoom was much more practical than other platforms such as "Go to Meetings." There was also mention that there it would be nice to have more guidance from people at the National office.

ORSEA NORTH DIRECTOR REPORT 10-23-2020

No education events or networking since the last board meeting.

Looking into Zoom Webinar and Go to Webinar to get information on platform and pricing. I think that it might behoove ORSEA to purchase an annual membership on a platform that we can use for our Spring seminar, but also that chapters can use to hold virtual education. Since we can have up to 100 attendees per webinar , we could market to other states as well.

**September 22, 2020 Affiliate Council Call
 e-Mail Invitations sent out July 24, 2020**

➔ **Narrative begins on Page 4** ←

**9-02-2020 e-Mail Invitation to register for
 the 9-22-2020 AFFILIATE COUNCIL CALL**

NAEA Affiliate-Wide Meeting Registration
From: State Affiliate Support <affiliates@naea.org>
To: State Affiliate Support <affiliates@naea.org>
Cc: Michael Nelson <mnelson@naea.org>; Katrina Holland <kholland@naea.org>; Allison Tune <atune@naea.org>
Date: Wed, Sep 2, 2020 12:53 pm

Dear NAEA State Affiliate Leaders:

The NAEA Affiliate Council would like you to join them for the next Affiliate-Wide Meeting at 2:00 pm Eastern on Tuesday, September 22. We'll share the agenda for this meeting in the coming weeks.



Please register in advance for this meeting:
<https://us02web.zoom.us/join/register/tZMyc-2gqjMjGd3Qci2xku4AlyVezDxtFRxh>

After registering, you will receive a confirmation email containing information about joining the meeting.

We look forward to seeing you.

NAEA Affiliate Support

RESPONSE TO REGISTRATION

Topic	NAEA Affiliate Council	
Time	Sep 22, 2020 02:00 PM in Eastern Time (US and Canada)  Add to calendar	
Meeting ID:	872 4484 8939	

To Join the Meeting

Join from a PC, Mac, iPad, iPhone or Android device:

Please click this URL to join. https://us02web.zoom.us/j/87244848939?tl=kQW551y8ffEGtgQMjyW1DtByPT--nZmFVT_8VAONJri.DQIAAAAUUDK_KxZqUzhMdDIKVVRYdTJYRJAwd3NwVWFRAAAAAAAAAAAAAAAAAAAAAAAAAAAAA&pwd=TldPZGwVMU9CekswS3FWVIBhTkkKdz09

To Cancel This Registration

Agenda

- I. Introduction and Remarks - Bernadette Antonelli, EA
- II. NAEA Update - Don Rosenberg, EA, NAEA President
- III. Break-out Sessions – Discuss Affiliate Score Card
- IV. Announcements/Upcoming Affiliate Meetings
- V. Adjourn

These meetings are intended for **ALL** State Affiliate Leadership (Executive Leadership, Board of Directors, Committee Chairs). All calls will begin promptly at 2:00 p.m. ET. **Please forward this to your Affiliate Leadership in the event they did not receive this notification.**

If you have any questions regarding the Affiliate meetings or anything Affiliate related, please do not hesitate to contact me.

Michael

Michael Hamilton

Senior Manager, Membership Operations and Engagement

National Association of Enrolled Agents – *Powering America's Tax Experts®*

1730 Rhode Island Avenue, NW, Suite 400 Washington, DC 20036
202-822-6232 | mhamilton@naea.org | www.naea.org

Bernadette Antonelli , EA Affiliate Council Chair

Affiliate Council Assignments 2020-2021

<u>Bernadette Antonelli, EA</u>
New York
Massachusetts
Rhode Island
Northern New England
Pennsylvania
Maryland / DC
Connecticut

<u>Jeff Augenstein, EA</u>
California
Nevada
Washington State
Hawaii
New Mexico
Oregon
Colorado

<u>Melissa Longmuir, EA</u>
Arizona
Florida
Oklahoma
Arkansas
Louisiana
Mississippi

<u>Michael Carlisle, EA</u>
Alabama
Georgia
North Carolina
South Carolina
Tennessee
Virginia

<u>Michael Lawrence, EA</u>
Wisconsin
Kentucky
Minnesota
Missouri
Texas
Great West- ID, MT, UT, WY

<u>Bill Nemeth, EA</u>
Illinois
Indiana
Michigan
Ohio
Iowa
New Jersey

Introduction – Bernadette Antonelli , EA Affiliate Council Chair

Welcomed everyone to the call and thanked them for participating in this call.

The Affiliate Council call invitation was very effective – over 100 attendees on this call (average attendance over the past 2 years has been under 50).

Opening Remarks – Don Rosenberg, EA NAEA President

Don greeted everyone and thanked them for being on the call.

Don related that the NAEA Board decided that NAEA must move in a different direction and did not renew Bob Kerr's Contract. In the interim while the Board searches for a permanent EVP, Mike Nelson was brought back in as the interim EVP. Jan 2021 is the target date to hire a new EVP.

A little Background on Mike Nelson; Mike served as the NAEA EVP for 6 years. During his tenure, Mike energized the Association's education program, created the SSLA (Schuldiner/Smollen Leadership Academy) and brokered the creation of the Educate America initiative. After Mike left NAEA, he served as CEO for the National Association of Court Reporters – He retired in 2018 and continues to engage in consulting to nonprofits and associations.

Mike Nelson, NAEA Acting EVP

Mike introduced himself and looks forward to working with NAEA Staff and Members.



Mike's e-Mail Address is:

MNelson@NAEA.org

NAEA continues to work toward completing the new web site and the associated revenue and membership reports. Affiliate membership reports and affiliate dues have not been sent out since July.

Update on SSLA – Terry Durkin, EA

A virtual SSLA program is being planned. There will be no cost to attend; the program is open to anyone who is active in their affiliate governance activities. Facilitators will include Terry Durkin, Lonny Geary, Raven Deerwater, Mike Nelson and Angela Radic.

The Virtual SSLA will be held on the following Thursdays from 1-2:30 Eastern Time:

Dec 3

Dec 10

Dec 17

PTIN CE Verification and Active EA Websites – Bill Nemeth, EA

Each active EA must complete at least 16 hours of CE including 2 Ethics CE each year as well as 30 hours of CE to satisfy NAEA membership requirements.

GAEA has created a tutorial to distribute to all members so that they can verify the CE associated with their PTIN number.

The PTIN Tutorial can be accessed at: www.4GAEA.org

Please distribute this tutorial to your members.

Listing of Active Enrolled Agents (currently about 65K EAs)

This list used to be available under a FOIA request. It is now available on-line.

Just GOOGLE: [List of Active Enrolled Agents](#)

The list is available for download as a CSV File; it is updated twice a year.

Listing of Active PTIN Holders (currently about 767K PTIN Holders)

Just GOOGLE: [List of Active PTIN Holders](#)

The list of PTIN Holders is available as a CSV file on-line by state and territory as well as a complete Consolidated List.

Awards Committee – Kerry Freeman, EA Awards Chair

Deserving affiliate members can be nominated for one of eight awards by submitting their name on-line at the NAEA Web Site. Please take a moment to nominate some hardworking member to acknowledge their dedication and support.

The 8 award categories are:

Submit your nomination →

The Founders Award

The Excellence in Education Award

The Excellence in Public Awareness Award

The EA Mentor of The Year Award

The Lee T. Byrd Outstanding Volunteer Award

The Outstanding Supporter of EAs Award

The Bill Payne Advocacy Award

The Emerging Leader Award

Bernadette Antonelli, EA Affiliate Council Chair - Breakout Sessions

The Zoom meeting was then broken out into 6 separate “rooms” according to the Affiliate Assignments with the suggested topic in each room:

Discussion of the Affiliate Score Card scoring factors.

Breakout rooms ran for 20 minutes and confirmed proof of concept for Zoom Breakout Rooms.

Coming soon – NAEA Advanced Representation Digital Forum

**RECEIVE \$250 OFF ADVANCED REPRESENTATION DIGITAL FORUM
NOVEMBER 9-11, 2020**

Register for the EA 2020 Digital Forum in September and receive \$250 off registration for our Representation Digital Course this November! We understand that some learners are interested in beginning or continuing the process of becoming an *NTPI Fellow*. To help you continue the journey, we will offer courses that give you credit for our NTPI Level 1 and NTPI Level 3 at both the September Digital Forum and the November Digital Forum. Consider attending both of our Digital Forums this year for a cost savings that helps to advance your NTPI journey. **Discover what NTPI content will be offered for each forum on the *Education* page.**

KEEP LEARNING:

Future NAEA Virtual Forums and Education Events

EA 2020 Representation Digital Forum

November 9 – 11, 2020

NAEA Tax Preparation Digital Course

December 2 - 4, 2020

NAEA Tax Preparation Digital Course

January 12 - 14, 2020

NAEA Education Foundation FREE Webinars – Bill Nemeth, EA

The Education Foundation is offering FREE webinars to the state affiliates. The primary focus is to get all affiliates up to the level where they can offer virtual CE to their affiliate members. Bill Nemeth, EF Trustee, will supply material for affiliates to offer their own virtual programs and/or Bill can present this webinar material as required.

Each affiliate taking advantage of this program can make a donation (Optional) to the NAEA EF to support this fundraising activity.

The list of available webinars:

- Clever Strategies to Prevent CP2000 Notices
- First Time Penalty Abatement
- IRS Transcript Analysis - Additional uses of IRS transcripts
- Recreating Business Mileage Logs using CarFAX
- Assisting your Clients who have Petitioned Tax Court Pro Se
- Health Savings Accounts (HSA) under Obamacare

If your affiliate is interested, please contact Bill at WGNemeth@aol.com

Wrap-Up – Bernadette Antonelli, EA

Next Call is Tuesday October 27 at 2 PM Eastern

Schedule for the remainder of 2020:

Tuesday December 8, 2020 2 PM Eastern

9/22/2020		102 Attendees		
First Name	Last Name	Email	State Society	What is your Officer Title with your state society?
Sandra	Weidner	SWEIDNER45@COMCAST.NET	New Mexico	Vice President
Jeffrey	Gentner	jrgentnerea@gmail.com	New York	Executive Director, NAEA Director
Deltrease	Hart-Anderson	deltrease@dhartaccounting.com	South Carolina	President
Janeen	Sorrentino	jsorrentino@maloneyco.com	Northern New England	NH Board member
Lynn	Jacobs	lynnjt@bellsouth.net	Louisiana	Director NAEA
Trish	Evenstad	evenstadtax@gmail.com	Wisconsin	Director NAEA
Chet	Burgess	manager@4gaea.org	Georgia	Manager
Moses	Abdallah	mcataxpro@msn.com	Virginia	Fredericksburg Chapter President
Michelle	McCaughey	mmccaughey@naea.org	NAEA Staff	District of Columbia
Melissa	Longmuir	mlongmuir@yahoo.com	Washington	Affiliate Council
Jennifer	Verhey	jennifer@vantagecpa.net	Colorado	Treasurer
David	Tolleth	dtolleth@digitalabacus.net	New Jersey	NAEA President Elect
LAURA	VENSEL	LAURA@TAXNOTICEHELP.COM	Florida	IMMEDIATE PAST PRESIDENT
Allison	Tune	atune@naea.org	NAEA Staff	Membership Manager
Mary	Lawson	Mary.L@fouldsco.com	Michigan	Director
Peter	Wanco	pwanco1@gmail.com	New Mexico	President
Kimberly	Henderson	kimh@computaxaz.com	Arizona	Director
Phyllis	Kubey	pkubey@nyc.rr.com	New York	1st Vice President
DONALD	ROSENBERG	don@donrosenbergea.com	New York	NAEA President
John	Perry	JMPerry3okc2@cox.net	Oklahoma	Vice President
Bill	Welsh	billstaxservice@live.com	Arizona	Director
Catherine	Bostock-Hudy	cbhudy@cbhbusserv.com	New York	Immediate Past President
Jennifer	Cable	JENNIFER@TAXDEBTPROFESSIONALS.COM	Virginia	Director
Michael	Lawrence	Jordantax@centralny.twcbc.com	New York	President
Elizabeth	Tillotson	elizabeth@rtaxgroup.com	Colorado	Director, Membership committee chair
Natasha	Johnson	natasha@financialbee.com	Pennsylvania	1st Vice President
Jeff	Augenstein	jeff@northernazfinancial.com	Arizona	Chapter Rep
Chris	Hardy	chris@chrishardy.com	Georgia	Director NAEA
Teresa	Coleman	teresa@colemantax.com	Texas	1st VP
Shelley	Barker	sbarker800@aol.com	New Mexico	Past President
Laura	Bennett	lbennett@b-scpa.com	North Carolina	Secretary
Cindy	Nelson	crnelson@cableone.net	Arizona	Immediate Past President
Ferdinand	Pellegrino	nandopell63@gmail.com	Massachusetts	Vice President
Theresa	Page	theresa.g.page@snet.net	Connecticut	Treasurer
Ty	Gaines	Mstyea@yahoo.com	Virginia	President
Katrina	Holland	kholland@naea.org	NAEA Staff	Senior Director
George	Caesar	gpcnewyork@gmail.com	North Carolina	Director
Melissa	Rainwater-Fleming	melissa@northernazfinancial.com	Arizona	President
BILL	NEMETH	wgnemeth@aol.com	Georgia	IMMEDIATE PAST PRESIDENT, EDUC CHAIR, Affiliate Council
Warren	Hudak	whudak@hudakandcompany.com	Pennsylvania	2nd VP
Jennifer	Brown	mytaxexpertinc@gmail.com	Great West SEA	President
Mike	Nelson	mnelson@naea.org	NAEA EVP	NAEA EVP - Acting
Aaron	Tower	atower@omni-financial.com	Colorado	President
Evelyn	Davis	eve@inorouttax.com	Oregon	Vice President
Shirley	Callahan, EA	shirleycallahanea@yahoo.com	Nevada	Membership Director
Robin	Haar	robin@haarassociates.com	New Jersey	Treasurer
Barbara	Culver	bculver@taxcenterplus.com	Washington	Director, Past President

Michael A.	Carlisle, E.A.	michael@alternativetaxsvc.com	Florida	Bylaws Chair/Strategic Planning Chair
Faye	Touchet	touchetea@lusfiber.net	Louisiana	President
Linda	Comingore	l.comingore@gmail.com	Indiana	Secretary
Jeffrey	Gentner	jgentner@gmail.com	New York	Executive Director, Director NAEA
Emelia	Mensa	em@emensacpa.com	Connecticut	Member
Mary	Sunderland	mary.sunderland@comcast.net	New Jersey	President
Linda	Haller	linda@ahsaccounting.com	Minnesota	Treasurer
Douglas	Miller	ea_taxhelp@yahoo.com	Maryland	Board Member
Connie	Stimart	tiprs@ymail.com	Wisconsin	Vice President
Ira	SMILOVITZ	IRASMILOVITZ@GMAIL.COM	New Jersey	Secretary
William	Van Hall	William_van_hall@sbcglobal.net	Connecticut	Vice President
LISA	VIVENS	lvbook.tax@gmail.com	Ohio	Immediate Past President
Bernadette	Antonelli	BAntonelli@Arlingtontax.com	New Jersey	Affiliate Council Chair
Michael	Hamilton	mhamilton@naea.org	NAEA Staff	Senior Manager, Membership Operations and Engagement
Carla	Gwinn	Taxlady1@ameritech.net	Ohio	Director
Carrie	Braswell	carriebraswelloffice@gmail.com	Virginia	President
Judith	Lashinski	judy.clwtax@frontier.com	Minnesota	Director
MARILYN H	BRODEUR, EA	marilyn@brodeurtax.com	Massachusetts	Director
Terry	Durkin	terry@durkin-associates.com	Massachusetts	Past President
Craig	Balch	craigthetaxguy@gmail.com	South Carolina	Vice President
Nancy	Lyman, EA	nancy@stevenswilcox.com	Northern New England	NAEA Treasurer
Elizabeth	Barnes	evp@fseonline.org	Florida	Executive Vice President
John	Dundon	John@JohnRDundon.com	Colorado	Audit Committee Chair
Jason	Dinesen	dinesentax@gmail.com	Iowa	President
Kathy	Verne	klvtax@yahoo.com	NAEA	Secretary
Joni	Cappuccio	Jonicapea@aol.com	PSEA	Immediate Past President
Steven	Heeley	Steven@SLHeeleyTax.com	Illinois	President
David	LaRochelle	dave@nhtaxservices.com	Northern New England	President
Twila	Midwood	tmidwood@advancedtaxcentre.com	Florida	NAEA Director
Pamela	Taylor	alltax@coxinet.net	Oklahoma	President
Jerry	Bolling	bollingaccutaxes@gmail.com	Maryland	Treasurer
Lance	Bonlender, EA	Lance@LBTaxServices.com	Arizona	Past President
Karen	Winters	kwinters@winters-smith.com	South Carolina	Board Member
Patricia	Mantone	tmantone@maloneyco.com	New Hampshire	Secretary
Jerry	Gaddis	Jerry@TropicalTax.com	Florida	NAEA Immediate Past President
Kathy	Brown	kathy@thekatco.com	Kentucky	President
Robert	Jacobs	ataxguru@gmail.com	md/dc sea	President
Candace	Cansler	administrator@ncseonline.org	North Carolina	Administrator
Maddy	Gaoiran	bnottax@epuerto.net	Oregon	President
Sheryl	Gorman	sherylgorman@hotmail.com	Missouri	Secretary
Steve	Rue	steve@rueassociates.com	Virginia	Board Member
LISA	CANCELLARICH	LISA@LTSAAccounting.COM	New York	DIRECTOR/MEMBERSHIP CHAIRPERSON
Stanley	Plaugher	bill@lunastax.com	Colorado	Board Member
Donna	Tuke	dmtuke@gmail.com	Illinois	EVP
Eric	Duncan	Eric@PadgettRichmond.com	Virginia	Treasurer
Raymond	Iacuna	ray@lalunatax.com	Connecticut	President
Karen	Wiseman	karen@wisemantax.com	Florida	President
Virginia	Fell	r_fell@msn.com	New Mexico	Member, At Large
Maria	Belden	maria.belden@speikercompany.com	Minnesota	President Elect
Linda	Sandidge	lindaea11@att.net	Louisiana	Immediate Past President
Kinna	McDavid	EA@AllWinEnterprise.com	Colorado	Secretary
Penny	Fisher	penny@bpntaxes.com	Colorado	Vice President
Crystal	Wheeler	Crystal@wheelerstax.com	Wisconsin	President
Mary	Lawson	Call-In 989-975-6269	Michigan	Board Member

From: Eve Davis <eve@inorouttax.com>
Sent: Saturday, October 24, 2020 1:14 PM
To: Nicole Piehl
Cc: Anne Burgess; Barb Craven; Bnottax; carolwild1040@gmail.com; danielstearns@live.com; Ira Rosenberg; Joyce Davis; June Brock; Marie Linders; Peter Mar; Susan Bladorn
Subject: Re: Collections class

Thank you Nicole, you rock!

Sent from my iPhone

On Oct 23, 2020, at 2:16 PM, Nicole Piehl <nicole@kentandersonlaw.com> wrote:

The IRS Program Number for Dan's collections class is B6U61-T-00103-20-0.

Nicole Piehl, EA
Kent Anderson Law Office
888 West Park Street
Eugene, OR 97401
541-683-5100

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Oregon Society Member Roster

As of 2020-10-19 18:12:15 Eastern Standard Time/EST • Generated by Mich

New/About to Suspend	Item: Iter	First Name	Last Name	Pd Thru Date	End Date
About to Suspend	ORSEA	Melba	Carter	8/31/2020	10/30/2020
About to Suspend	ORSEA	Connie	Fox	8/31/2020	10/30/2020
About to Suspend	ORSEA	Cynthia	Lawson	8/31/2020	10/30/2020
About to Suspend	ORSEA	Mary	Linebarger	8/31/2020	10/30/2020
	ORSEA	Abigail	Frederick	9/30/2020	11/29/2020
	ORSEA	Jean	Krieger	9/30/2020	11/29/2020
	ORSEA	Debra	Oglesby	9/30/2020	11/29/2020
	ORSEA	Carol	Smith	9/30/2020	11/29/2020
	ORSEA	Dorothy	Walsh	9/30/2020	11/29/2020
	ORSEA	Chizuko	Yamakawa	9/30/2020	11/29/2020
	ORSEA	Amy	Fuller	9/30/2020	11/29/2020
	ORSEA	Maria	Arbuckle	10/31/2020	12/30/2020
	ORSEA	Vickie	Baker	10/31/2020	12/30/2020
	ORSEA	Bobbie	Jacobson	10/31/2020	12/30/2020
	ORSEA	Katrina	Long	10/31/2020	12/30/2020
	ORSEA	Cynthia	Rawlinson	10/31/2020	12/30/2020
	ORSEA	JACOB	SAVAGE	10/31/2020	12/30/2020
	ORSEA	Jerri	Schmidt	10/31/2020	12/30/2020
	ORSEA	Dawn	Buxton	11/30/2020	1/29/2021
	ORSEA	Mariette	Blay	11/30/2020	1/29/2021
	ORSEA	Thomas	Avalos	11/30/2020	1/29/2021
	ORSEA	Jeffrey	Dillon	11/30/2020	1/29/2021
	ORSEA	Angela	Gibson	11/30/2020	1/29/2021
	ORSEA	Helen	Morris	11/30/2020	1/29/2021
	ORSEA	Christine	Todd	11/30/2020	1/29/2021
	ORSEA	David	Strubhar	11/30/2020	1/29/2021
	ORSEA	Jennifer	O'Halloran	11/30/2020	1/29/2021
	ORSEA	Judy	Johnson	11/30/2020	1/29/2021
	ORSEA	Patrick	Hurley	12/31/2020	3/1/2021
	ORSEA	Megan	Leisy	12/31/2020	3/1/2021
	ORSEA	M.	McKenzie	12/31/2020	3/1/2021
	ORSEA	Jane	Supnet	12/31/2020	3/1/2021
	ORSEA	Vicki	Coscia	1/31/2021	4/1/2021
	ORSEA	Joseph	Anthony	1/31/2021	4/1/2021
	ORSEA	Kristine	Grimes	1/31/2021	4/1/2021
	ORSEA	Gabrielle	Josephson	1/31/2021	4/1/2021
	ORSEA	Tammy	Hastings	1/31/2021	4/1/2021
	ORSEA	Stuart	Martin	1/31/2021	4/1/2021
	ORSEA	Richard	Morris	1/31/2021	4/1/2021
	ORSEA	Cynthia	Petersen	1/31/2021	4/1/2021

ORSEA	Linda	Santee	1/31/2021	4/1/2021
ORSEA	Carolyn	Anderson	2/28/2021	4/29/2021
ORSEA	Marcello	Innocenti	2/28/2021	4/29/2021
ORSEA	Eileen	Hines	2/28/2021	4/29/2021
ORSEA	Raymond	Leslie	2/28/2021	4/29/2021
ORSEA	Rochelle	McEvoy	2/28/2021	4/29/2021
ORSEA	Kimberly	Mendez	2/28/2021	4/29/2021
ORSEA	Stanley	Christiansen	3/31/2021	5/30/2021
ORSEA	Stacy	Collins	3/31/2021	5/30/2021
ORSEA	Rebecca	Klotz	3/31/2021	5/30/2021
ORSEA	Emily	LeBlanc	3/31/2021	5/30/2021
ORSEA	Angela	Garcia	3/31/2021	5/30/2021
ORSEA	Katie	Parker	3/31/2021	5/30/2021
ORSEA	Donald	Thorn	3/31/2021	5/30/2021
ORSEA	Anne	Burgess	4/30/2021	6/29/2021
ORSEA	Lorie	Easlick	4/30/2021	6/29/2021
ORSEA	Peggy	Minter	4/30/2021	6/29/2021
ORSEA	Robert	Merriam	4/30/2021	6/29/2021
ORSEA	Jean	Robins	4/30/2021	6/29/2021
ORSEA	T.	Twombly	4/30/2021	6/29/2021
ORSEA	Windy	Alarie	5/31/2021	7/30/2021
ORSEA	Deborah	Brown	5/31/2021	7/30/2021
ORSEA	Richard	Davey	5/31/2021	7/30/2021
ORSEA	Irene	Gresick	5/31/2021	7/30/2021
ORSEA	Krista	Haas	5/31/2021	7/30/2021
ORSEA	Luke	Dillon	5/31/2021	7/30/2021
ORSEA	LaVerne	Lewis	5/31/2021	7/30/2021
ORSEA	Jeffrey	Linders	5/31/2021	7/30/2021
ORSEA	Joy	Gabel	5/31/2021	7/30/2021
ORSEA	Joseph	Alexander	6/30/2021	8/29/2021
ORSEA	Denise	Bean	6/30/2021	8/29/2021
ORSEA	John	Bowen	6/30/2021	8/29/2021
ORSEA	Sharon	Brenier	6/30/2021	8/29/2021
ORSEA	June	Brock	6/30/2021	8/29/2021
ORSEA	Barbara	Carpenter	6/30/2021	8/29/2021
ORSEA	Carol	Brooks	6/30/2021	8/29/2021
ORSEA	Susan	Bladorn	6/30/2021	8/29/2021
ORSEA	Barbara	Craven	6/30/2021	8/29/2021
ORSEA	Jeanne	Danials	6/30/2021	8/29/2021
ORSEA	Michael	Davidson	6/30/2021	8/29/2021
ORSEA	Antonia	Estes	6/30/2021	8/29/2021
ORSEA	Cletus	Fernandez	6/30/2021	8/29/2021
ORSEA	M. Jean	Annable	6/30/2021	8/29/2021
ORSEA	Tammy	Arnado	6/30/2021	8/29/2021
ORSEA	Catherine	Baker	6/30/2021	8/29/2021

ORSEA	Susie	Gregory	6/30/2021	8/29/2021
ORSEA	Stanley	Gresick	6/30/2021	8/29/2021
ORSEA	Jack	Griffin	6/30/2021	8/29/2021
ORSEA	Judith	Krussow	6/30/2021	8/29/2021
ORSEA	Marilyn	Johnston	6/30/2021	8/29/2021
ORSEA	Aleta	Johnston	6/30/2021	8/29/2021
ORSEA	Carol	Jonasson	6/30/2021	8/29/2021
ORSEA	Joyce	Kanoff	6/30/2021	8/29/2021
ORSEA	David	Harmsen	6/30/2021	8/29/2021
ORSEA	David	Hummel	6/30/2021	8/29/2021
ORSEA	Kirkwood	Donavin	6/30/2021	8/29/2021
ORSEA	Janet	Dotson	6/30/2021	8/29/2021
ORSEA	Susan	High	6/30/2021	8/29/2021
ORSEA	Donna	Hines	6/30/2021	8/29/2021
ORSEA	Melinda	Holberton	6/30/2021	8/29/2021
ORSEA	Florence	Lasswell	6/30/2021	8/29/2021
ORSEA	Susan	Lauderdale	6/30/2021	8/29/2021
ORSEA	Joyce	Davis	6/30/2021	8/29/2021
ORSEA	Diana	Day-Murphy	6/30/2021	8/29/2021
ORSEA	Roberta	Kinohi	6/30/2021	8/29/2021
ORSEA	Larry	Kjelden	6/30/2021	8/29/2021
ORSEA	Marie	Linders	6/30/2021	8/29/2021
ORSEA	Madillyn	Gaoiran	6/30/2021	8/29/2021
ORSEA	Raymond	Meyer	6/30/2021	8/29/2021
ORSEA	Gary	Gaska	6/30/2021	8/29/2021
ORSEA	Bonnie	Gatlin	6/30/2021	8/29/2021
ORSEA	Catherine	Giovinco	6/30/2021	8/29/2021
ORSEA	Bill	McCracken	6/30/2021	8/29/2021
ORSEA	Peter	Mar	6/30/2021	8/29/2021
ORSEA	Dale	Marino	6/30/2021	8/29/2021
ORSEA	Carol	Mulder	6/30/2021	8/29/2021
ORSEA	David	Purkey	6/30/2021	8/29/2021
ORSEA	Michelle	Rasmussen	6/30/2021	8/29/2021
ORSEA	Shirley-Marie	Raven	6/30/2021	8/29/2021
ORSEA	Nicole	Piehl	6/30/2021	8/29/2021
ORSEA	Carla	Pentkowski	6/30/2021	8/29/2021
ORSEA	Louis	Roner	6/30/2021	8/29/2021
ORSEA	Ira	Rosenberg	6/30/2021	8/29/2021
ORSEA	Hyong	Yu	6/30/2021	8/29/2021
ORSEA	Heidemarie	Zepf	6/30/2021	8/29/2021
ORSEA	Russell	Shaver	6/30/2021	8/29/2021
ORSEA	Douglas	Snyder	6/30/2021	8/29/2021
ORSEA	Monica	Scroup	6/30/2021	8/29/2021
ORSEA	Katie	St. Ores	6/30/2021	8/29/2021
ORSEA	Daniel	Stearns	6/30/2021	8/29/2021

New

ORSEA	Russell	Ward	6/30/2021	8/29/2021
ORSEA	Laurie	Wright	6/30/2021	8/29/2021
ORSEA	Kurt	Williams	6/30/2021	8/29/2021
ORSEA	Mary	Lunceford	6/30/2021	8/29/2021
ORSEA	Yuliya	Olaru	6/30/2021	8/29/2021
ORSEA	Kenneth	Osterman	6/30/2021	8/29/2021
ORSEA	Charlene	Van Cleef	6/30/2021	8/29/2021
ORSEA	Ailya	Rose	7/29/2021	9/27/2021
ORSEA	Michael	Imlah	7/31/2021	9/29/2021
ORSEA	Alicia	Soto	7/31/2021	9/29/2021
ORSEA	Irena	Solomon	7/31/2021	9/29/2021
ORSEA	George	Boomer	7/31/2021	9/29/2021
ORSEA	Evelyn	Davis	7/31/2021	9/29/2021
ORSEA	Holly	McCall	7/31/2021	9/29/2021
ORSEA	Mariluz	Reyes De Stearns	7/31/2021	9/29/2021
ORSEA	Melodie	Tooley	7/31/2021	9/29/2021
ORSEA	Carol	Wild	7/31/2021	9/29/2021
ORSEA	Melba	Carter	8/31/2021	10/30/2021
ORSEA	Donna	Byrne	8/31/2021	10/30/2021
ORSEA	Wendy	DeMaree	8/31/2021	10/30/2021
ORSEA	Dale	Haskin	8/31/2021	10/30/2021
ORSEA	Connie	Fox	8/31/2021	10/30/2021
ORSEA	Deborah	Black	9/8/2021	11/7/2021
ORSEA	Javier	Correa	9/30/2021	11/29/2021
ORSEA	Annette	Saarinen	9/30/2021	11/29/2021
ORSEA	Dorothy	Walsh	9/30/2021	11/29/2021
ORSEA	Amy	Fuller	9/30/2021	11/29/2021
ORSEA	Michael	Carpenter	6/30/2022	8/29/2022
Total		158		

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10151 SW Barbur Blvd Ste 106, Portland, OR 97219-5952	(503) 246-6994
21882 SW Chehalis St, Tualatin, OR 97062-9034	(503) 961-3417
309 Court St, The Dalles, OR 97058-2111 USA	(541) 298-2829
1 SW Columbia St Ste 400, Portland, OR 97258-2005	(503) 227-1044
2268 NW Kearney St, Portland, OR 97210-3014 USA	(949) 677-8301
263 E Historic Columbia River Hwy, Troutdale, OR 97060-2081	(503) 666-6223
406 High St, Silverton, OR 97381-1713	(503) 873-6125
663 A St, Ashland, OR 97520-2070 USA	(541) 482-4748
4-8-3 Jyomyoji, Kamakura-shi, Kanagawa-ken, JPN 248-0003	81-467-23-8213
10524 SE Stark St Ste 100, Portland, OR 97216-2882 USA	(503) 251-2100
875 Idylwood Dr SE, Salem, OR 97302-3907	(503) 485-1983
5624 Delaware Ave, Klamath Falls, OR 97603-6926	(541) 885-2170
1140 NW Walnut Blvd, Corvallis, OR 97330-3604	(541) 760-7689
69 W Ash St, Lebanon, OR 97355-3332 USA	(541) 570-1487
2915 Portland Rd, Newberg, OR 97132-1972 USA	(503) 487-6935
851 N Winchell St, Portland, OR 97217-1141 USA	(503) 286-1561
15405 SW 116th Ave Ste 202, King City, OR 97224-4104	(503) 601-4520
444 N 4th St, Coos Bay, OR 97420-2222 USA	(541) 294-0460
825 NE 20th Ave Ste 320, Portland, OR 97232-2275 USA	(503) 703-3751
494 Strait Way, Central Point, OR 97502-1736 USA	(541) 659-3703
910 Oakway Dr, Coos Bay, OR 97420-1929 USA	(619) 952-9169
4116 SE Harrison St, Milwaukie, OR 97222-5860 USA	(503) 208-4231
PO Box 2557, Battle Ground, WA 98604-2557	(360) 687-3154
11821 SW Morning Hill Dr, Tigard, OR 97223-1888	(503) 524-3130
8855 SW Holly Ln Ste 118, Wilsonville, OR 97070-8793	(503) 989-2527
9694 SW Siletz Dr, Tualatin, OR 97062-9556 USA	(503) 784-4487
15675 SW Brasada Ranch Rd, Powell Butte, OR 97753	(503) 348-3537
843 Alder Creek Dr Ste B, Medford, OR 97504-8904	(541) 774-1040
801 NE 28th Ave, Portland, OR 97232-2408 USA	(971) 254-8318
PO Box 157, Depoe Bay, OR 97341-0157 USA	(541) 359-3660
2669 NE Twin Knolls Dr Ste 106, Bend, OR 97701-4895	(541) 388-2550
631 SE Rose St, Roseburg, OR 97470-4920 USA	(541) 672-4317
25 NW 23rd Pl Ste 6-401, Portland, OR 97210-5580 USA	(503) 281-2264
311 Mill St, Springfield, OR 97477-4535 USA	(541) 744-2727
2164 NE Broadway St, Portland, OR 97232-1513 USA	(503) 206-4202
PO Box 3233, Central Point, OR 97502 USA	(541) 601-8192
2112 Cove Ave, La Grande, OR 97850-3903 USA	(541) 963-4969
7615 SW Lotus Blossom Pl, Beaverton, OR 97008-6233	(503) 646-9941
PO Box 143, Carmen, ID 83462-0143 USA	(541) 419-7346

8543 NE Broadway, Portland, OR 97220-5626 USA	(503) 421-6265
525 W Gloucester St, Gladstone, OR 97027-2040 USA	(503) 777-1040
2757 River Rd, Eugene, OR 97404-2047 USA	(541) 689-7071
4931 SW 76th Avenue #357, Portland, OR 97225-1805	(503) 539-7238
15395 SE Bradford Rd, Clackamas, OR 97015-5486 USA	(503) 703-8478
843 Alder Creek Dr Ste B, Medford, OR 97504-8904 USA	(541) 774-1040
PO Box 7216, Springfield, OR 97475-0010 USA	(541) 393-8765
19022 Old River Dr, West Linn, OR 97068-1041 USA	(503) 320-9572
17656 Paladin Dr, Bend, OR 97703-9132 USA	(541) 788-4303
PO Box 1885, Clackamas, OR 97015-1885 USA	(503) 655-4775
888 W Park St, Eugene, OR 97401-2929 USA	(541) 683-5100
13456 S Cayuse Ct, Molalla, OR 97038-9503 USA	(503) 804-7557
2567 Game Farm Rd, Springfield, OR 97477-7577	(541) 686-9223
33838 E River Dr Unit 43, Creswell, OR 97426-9320	(541) 895-3239
177 Alta Vista Rd., Eagle Point, OR 97524-0184	(541) 879-1058
24109 NE Holladay St, Wood Village, OR 97060-2907	(503) 661-6456
88216 Highway 42 S, Bandon, OR 97411-8359 USA	(541) 347-7166
10157 SW Barbur Blvd Ste 106C, Portland, OR 97219-5910	(971) 302-7943
18522 SE Abernethy Ln, Milwaukie, OR 97267-6701 USA	(503) 333-7560
1690 NE Lynda Ln, Grants Pass, OR 97526-3599 USA	(541) 476-5548
PO Box 2934, Oregon City, OR 97045-0272 USA	(503) 680-4080
151 SE 223rd Ave, Gresham, OR 97030-7482 USA	(503) 666-7909
4365 NW Queens Ave, Corvallis, OR 97330-3228 USA	(541) 752-4239
4409 S Stage Rd, Medford, OR 97501-9400 USA	(541) 772-6530
668 NE Johnson St Apt 8, Myrtle Creek, OR 97457-9526	(503) 569-6785
3604 SE Powell Valley Rd Apt 324, Gresham, OR 97080-1669	(503) 674-2574
513 Main St Ste 101, Klamath Falls, OR 97601-6057 USA	(541) 884-8822
PO Box 672 603 S Main St, Condon, OR 97823-0672 USA	(541) 384-5444
12047 SW Caffall Ln, Tigard, OR 97224-0008 USA	(503) 639-2165
1293 18th St, Springfield, OR 97477-3416 USA	(541) 726-0908
1900 NE Highway 99W Ste C3, McMinnville, OR 97128-2757	(971) 832-2021
4130 SW 117th Ave # A254, Beaverton, OR 97005-5606	(503) 577-9248
414 E Pine St, Central Point, OR 97502-2443 USA	(541) 664-3018
5412 SE Foster Rd, Portland, OR 97206-3954 USA	(503) 232-6137
PO Box 435, Jacksonville, OR 97530-0435 USA	(541) 899-1014
631 SE Rose St, Roseburg, OR 97470-4920 USA	(541) 672-4317
2659 Commercial St SE Ste 282, Salem, OR 97302-4385	(503) 399-0017
PO Box 69, Keno, OR 97627-0069 USA	(541) 273-8593
107 SW Hooker St, Portland, OR 97201-4727 USA	(503) 223-6290
220 N G St, Lakeview, OR 97630-1418 USA	(541) 947-3636
2550 Market St NE, Salem, OR 97301-1579 USA	(503) 588-0498
PO Box 2528, Paradise, CA 95967-2528 USA	(530) 895-3041
21359 Puffin Dr, Bend, OR 97701-9625 USA	(541) 389-4535
1113 Hill St SE Ste H, Albany, OR 97322-3283 USA	(541) 926-7982

1352 SE Cobb St, Roseburg, OR 97470-4036 USA	(541) 673-1247
4365 NW Queens Ave, Corvallis, OR 97330-3228 USA	(541) 752-4239
5200 Meadows Rd Ste 150, Lake Oswego, OR 97035-0066	(503) 697-6540
PO Box 424, Corbett, OR 97019-0424 USA	(503) 313-9722
61 S 2nd St, Central Point, OR 97502-2208 USA	(503) 664-3363
28424 SE Highway 212, Boring, OR 97009-9144 USA	(503) 663-3308
5729 Main St 219, Springfield, OR 97478 USA	(541) 341-4673
2294 Pacific Blvd SE, Albany, OR 97321-5067 USA	(541) 928-6432
4038 N Interstate Ave, Portland, OR 97227-1071 USA	(503) 238-0621
285 NW 86th Ave, Portland, OR 97229-6605 USA	(503) 292-2186
5778 Mica St, Springfield, OR 97478-8522 USA	(541) 485-8581
1660 Willamette St, Eugene, OR 97401-4046 USA	(541) 343-6502
45 82nd Dr Ste 55, Gladstone, OR 97027-2562 USA	(503) 655-3737
568 NE Savannah Dr Ste 2, Bend, OR 97701-4866 USA	(541) 388-9882
PO Box 55236, Portland, OR 97238-5236 USA	(503) 805-9216
418 NW 5th St, Corvallis, OR 97330-6417 USA	(541) 753-4009
1307 NE 78th Street B12, Vancouver, WA 98665-9670	(360) 694-8206
20965 Limestone Ave, Bend, OR 97703-8932 USA	(541) 383-4125
61396 S Highway 97 Ste 225, Bend, OR 97702-2159	(541) 388-8832
8438 SW 37th Ave, Portland, OR 97219-3611 USA	(503) 477-5155
9013 NE Highway 99 Ste O, Vancouver, WA 98665-8943	(360) 576-8648
513 Main St Ste 101, Klamath Falls, OR 97601-6057 USA	(541) 884-8822
1934 Newmark St Ste A, North Bend, OR 97459-1274 USA	(541) 756-2929
1233 SE 122nd Ave, Portland, OR 97233-1201 USA	(503) 253-1178
33 NW 3rd St, Gresham, OR 97030-7201 USA	(503) 666-7100
PO Box 461, Lincoln City, OR 97367-0461 USA	(541) 996-8037
10901 E Mapleton Rd, Mapleton, OR 97453-9635 USA	
PO Box 2214, Oregon City, OR 97045-0214 USA	(503) 656-0699
PO Box 90, Alvadore, OR 97409-0090 USA	(541) 607-9200
1428 SE 20th Ave, Portland, OR 97214-3814 USA	(503) 239-4716
510 NW 14th St, Corvallis, OR 97330-5910 USA	(541) 430-2027
1905 NW 169th Pl Ste 220, Beaverton, OR 97006-7303 USA	(503) 614-8077
PO Box 627, Canby, OR 97013-0627 USA	(503) 263-4705
33743 Molitor Hill Rd, Cottage Grove, OR 97424-9443 USA	(541) 767-0042
888 W Park St, Eugene, OR 97401-2929 USA	(541) 683-5100
1070 NW Murray Rd Ste 4, Portland, OR 97229-5568 USA	(503) 626-8100
78120 Highway 99, Cottage Grove, OR 97424-9362 USA	(541) 942-8237
530 NW Battaglia Ave, Gresham, OR 97030-5243 USA	(503) 661-6406
811 E Burnside St Ste 219, Portland, OR 97214-1231 USA	(503) 235-2714
23005 Varney Creek Rd, Klamath Falls, OR 97601-8519 USA	(310) 789-5207
17525 SE Decker Rd, Boring, OR 97009-8517 USA	(503) 558-9220
9011 SW Beaverton Hillsdale Hwy Ste 1A, Portland, OR 97225-2452	(503) 297-2610
PO Box 97, Warrenton, OR 97146-0097 USA	(503) 861-3383
435 NE Evans St, McMinnville, OR 97128 USA	(971) 279-7788
181 N Grant St Ste 202, Canby, OR 97013-3600	(503)263-3242

13420 NE Fox Hollow Ln, Newberg, OR 97132-6450	(503) 704-2659
2650 Frontage Rd, Reedsport, OR 97467-1813 USA	(541) 271-3249
21356 Hubbard Cutoff Rd NE Unit 50, Aurora, OR 97002-8406	(503) 678-5765
PO Box 865, Molalla, OR 97038-0865	(503) 829-2058
14602 NE Fourth Plain Blvd Ste H, Vancouver, WA 98682-5023	(360) 200-5706
8810 SW Scoffins St, Tigard, OR 97223-6227 USA	(503) 639-2200
13205 SW Heather Ct, Beaverton, OR 97008-5611	(503) 646-6582
877 Arago Ave, Coos Bay, OR 97420 United States	
6127 SW 161st Pl, Beaverton, OR 97007-4007 USA	(503) 332-0938
11580 NW Reeves St, Portland, OR 97229-5658 USA	
2164 NE Broadway St, Portland, OR 97232-1513 USA	(203) 617-5100
71 Water Str. Apt. 201, Ashland, OR 97520 USA	
3828 SE Division St, Portland, OR 97202 USA	(503) 239-0569
5311 SE Powell Blvd, Portland, OR 97206 USA	(503) 477-4396
181 N Grant St Ste 202, Canby, OR 97013-3600 USA	(503)263-3242
213 Madrona Ave SE, Salem, OR 97302-4609 USA	503-585-4499 x 305
8885 SW Canyon Rd Ste 133, Portland, OR 97225-3455	(503) 267-6126
PO Box 2089, Redmond, OR 97756-0538 USA	(541) 923-8770
PO Box 655, Independence, OR 97351-0655 USA	(503) 765-8686
116 NE Steiger St Ste B, Grants Pass, OR 97526-1312	(541) 244-1886
15611 NE Glisan St, Portland, OR 97230-4867	(503) 252-9509
10151 SW Barbur Blvd Ste 106, Portland, OR 97219-5952	(503) 246-6994
315 South Timber Creek Drive, Sisters, OR 97759	(530) 407-2815
9620 NE Tanasbourne Dr Ste 200, Hillsboro, OR 97124-7845	(503) 693-8208
8050 SW Pfaffle St Ste 110, Tigard, OR 97223-6758	(503) 691-1040
663 A St, Ashland, OR 97520-2070	(541) 482-4748
10524 SE Stark St Ste 100, Portland, OR 97216-2882	(503) 251-2100
5412 SE Foster Rd, Portland, OR 97206-3954	(503) 232-6137

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HISTORIAN POLICIES & PROCEDURES AWARDS/SCHOLARSHIPS COMBINED COMMITTEE REPORT

October 23, 2020

The 2019-2020 fiscal year of the Oregon Society of Enrolled Agents "OrSEA" has been none other than historical. Hopefully these events will never be repeated and never have to be endured again. As the long-standing OrSEA Historian, I suggest that this report be included in every officer, director, and committee chair notebooks. It is important to document these events in our permanent corporate records.

On July 1, 2019, newly elected OrSEA President Maddy Gairan began her first term, excited to take the helm and with many plans to take OrSEA into the future. Her plans were quickly thwarted and she, along with the OrSEA Board and Committee Members, adapted to the new COVID-19 world. In order to slow the spread of this deadly virus, in early March of 2020, Oregon Governor Kate Brown issued "non-essential" businesses to temporarily close throughout the state. Unprecedented changes were made to the way we do business and many of us, to this day, have not yet opened our storefronts. OrSEA began having their quarterly meetings via ZOOM, as businesses throughout the country, small and large, have also done. Many businesses have changed the way their employees are working, having a large portion of them working from their homes. Schools were closed and most have still not reopened to in-person learning. All along educators have been working through the process of remote learning and kids being at home.

Congress enacted legislation helping businesses stay open and employees working: \$1200 Stimulus payments from the IRS; Federal Unemployment benefit for those who lost their jobs or were furloughed, were eligible for an additional weekly \$600 benefit to employees and self-employed folks who were shut down or financially impacted; Oregon Unemployment benefits also made available to self-employed individuals; SBA Economic Injury Disaster Grant "EIDG" (tax-free grant of \$1000 per employee, including the owner, of up to a maximum of \$10,000); SBA Paycheck Protection Program Loan "PPPL" (forgivable if used for specific payroll and business costs); SBA Economic Injury Disaster Loan "EIDL" (a 30 year loan at a very low interest rate; first loan payment delayed 12 months); and many other federal, state, and local programs made possible by a variety of industries, non-profit organizations, and grassroots groups.

Then in September, due to the devastating wildfires in the State of Oregon, President Trump declared Clackamas, Douglas, Jackson, Klamath, Lane, Lincoln, Linn & Marion counties) as Federal Disaster Areas. Impacted individuals and households who reside or have a business located in any of these counties are eligible for relief. If you were a victim of Oregon wildfires and straight-line winds, any penalty and interest imposed for late filing or late payment related to due dates that fall on or after September 7, 2020 and before January 15, 2021

will be waived if you file and pay by January 15, 2021. This relief applies to all affected taxpayers (all residents of those counties) who are filing any income, payroll, and excise taxes originally due during the relief period.

Almost the entire State of Oregon was engulfed in thick smoke from the wildfires that eventually spread across the entire country. Continuously for more than 10 days of those last days of summer, the sun was blocked out, the outside temperature was cold, and we all had our doors and windows shut since the air quality was dangerous. There was zero fresh air anywhere, it seemed. The States of California and Colorado also endured rampant wildfires that have been devastating to those regions and the giant smoke plume could be seen from space!!

Due to the COVID-19 Virus rampantly spreading, OrSEA faced the unpleasant task of cancelling our 2020 Annual Conference. Ira Rosenberg, Conference Committee Chair; Nicole Piehl, Education Committee Chair; and many other members had worked tirelessly planning the event, which was scheduled to be held May 18-21, 2020 at the Oregon Best Western Conference Center in Hood River. All of the speakers were notified of the cancellation.

If all of that wasn't enough, we have also endured the sad deaths and unbelievable treatment of our black citizens; and the civil unrest that has ensued. Black Lives Matter!

The financial losses related to these major events is im-measurable. Maybe someday we will know the full effect and cost of these tragedies.

National Association of Enrolled Agents "NAEA" has also gone through many changes. They are our eyes and ears in Washington D.C. and we appreciate being affiliated, giving us access to the rest of the grEAt tax experts in the country.

The bottom line is that OrSEA has been put "on hold", so to speak. We continue to have our quarterly Board meetings via Zoom, planning for the future of OrSEA. Our membership is invited to attend those meetings and are welcome to participate.

Education is our priority and we hope you will continue to support all of the membership organizations by attending the various events that are available, whether live or virtual. There is some good stuff out there.

We very much appreciate your membership and hope that you will continue your support of both OrSEA and NAEA.

Until we meet again, take care and God Bless America!

Respectfully submitted,
Susan Bladorn
Historian Committee Chair

2020-2021 ORSEA PROPOSED SLATE OF NOMINEES

October 23, 2020
NOMINATING COMMITTEE

Following is the proposed slate of ORSEA Officer and Director Nominees with prospective initial election, maximum term(s), re-election date, and mandatory term end. Due to COVID-19 a late vote will be held at the annual membership meeting via Zoom on 10/23/2020.

Officers	Nominee	Initial Election	Maximum Term	Re-Election Date	Mandatory Ending Date
President	Maddy Gairan	May 2019	(2) one-year terms	May 2020	June 2021
Vice President	Evelyn Davis	May 2019	(2) one-year terms	May 2020	June 2021
Secretary	Barbara Craven	May 2018	(2) one-year terms	May 2020	June 2021
Treasurer	June Brock	May 2019	(4) one-year terms	May 2020	June 2023
Immediate Past President	Daniel Stearns				
Directors	Nominee	Initial Election	Maximum Term	Re-Election Date	Mandatory Ending Date
North Director *	Michael Davidson	May 2018	(2) two-year terms	May 2020	June 2022
North Director	Anne Burgess	May 2019	(2) two-year terms	May 2021	June 2023
Central Director – West	*Kirkwood Donavin <i>(*Appointed replacement to finish Peter Mar's first term through 06/30/20 – Mar's Initial election May 2018)</i>	**May 2020	(2) two-year terms	**May 2022	** June 2024
Central Director – East	Joyce Davis	May 2019	(2) two-years terms	May 2021	June 2023
South Director	*Susan Bladorn <i>(*Appointed replacement to finish June Brock's last term through 06/30/20 – Brock's Initial election May 2016; Brock was elected Treasurer in May 2019)</i>	**May 2020	(2) two-year terms	May 2022	June 2024
South Director	Marie Linders	May 2017	(2) two-year terms	May 2019	June 2021
At-Large Director	Carol Wild	May 2018	(2) two-year terms	May 2020	June 2022

(** Notes: a) Donavin & Bladorn Initial election date is May 2020 b) The stagger is off for South Director but will self-correct when Linders' term expires and a new South Director is elected)

BOLD Names & Dates indicate pending new election or re-election for Fiscal Year July 1 to June 30