



# Oregon Association of Tax Consultants New Membership Application

Phone: 503-726-0100  
 Email: [director@oatc-oregon.org](mailto:director@oatc-oregon.org)  
 Web site: <http://www.oatc-oregon.org>

Mail to: 3075 SE Century Blvd., Suite 110  
 Hillsboro, OR 97123-8187  
 FAX: 503-726-0101

<b>Contact Information</b>	<b>Name (Please print as you wish it to appear on your membership certificate)</b>		
	<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms.		
	Street Address (include Apt #)	Home Phone	Cell Phone
		Work Phone	FAX
	City, State Zip Code	Name of Firm	
Email	Web Site		

<b>Check / Complete All That Apply</b>	<b>Current Position:</b>	<b>Certifications:</b>	<input type="checkbox"/> Referred By: _____
	<input type="checkbox"/> Sole Practitioner	<input type="checkbox"/> Enrolled Agent (EA) License No. _____	Comments: _____ _____ _____
	<input type="checkbox"/> Partner	<input type="checkbox"/> Licensed Tax Consultant (LTC) License No. _____	
	<input type="checkbox"/> Employee	<input type="checkbox"/> Licensed Tax Preparer (LTP) License No. _____	
	<input type="checkbox"/> Corporate Officer	<input type="checkbox"/> Certified Public Accountant (CPA) License No. _____	
<b>PTIN: ('P' + 8 Numbers)</b>	<input type="checkbox"/> Other _____		
P			
Years experience in tax preparation: _____			
Number of Hours of Continuing Professional Education (CPE) completed within the 12-month period ending June 30 <sup>th</sup> : _____			
Please list any National or State Accounting or Tax Organizations in which you are now a member: _____			

<b>Membership Types and Dues</b>	<b>Membership Type:</b>
	<input type="checkbox"/> <b>Regular</b>
	<ul style="list-style-type: none"> <li>▪ Authorized by any applicable Oregon law to prepare tax returns (out of state members, not duly authorized by Oregon law, would require sponsorship by Regular member in good standing)</li> <li>▪ Agree to abide by the Articles of Incorporation, <u>Bylaws</u> and <u>Code of Ethics</u></li> <li>▪ Possess a background, experience or interests that demonstrate support for the purpose of the Association</li> <li>▪ Complete a minimum of thirty hours of Continuing Professional Education during each twelve month period ending June 30</li> </ul>
	<input type="checkbox"/> <b>Associate</b>
	<ul style="list-style-type: none"> <li>▪ Persons in any business or profession who are interested in the tax preparation field, and who agree to abide by the Bylaws and the Code of Ethics</li> </ul>
Prior OATC Membership: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Preferred Chapter (refer to the list on the back of the application): _____	
<b>Amount Due: \$90.00 Annual Dues* + \$15.00 one-time processing fee for new and returning members = \$105.00</b>	
<b>Payment Method</b>	
Amount: _____	
<input type="checkbox"/> Check payable to <b>OATC</b>	
<input type="checkbox"/> VISA / DISCOVER / MASTERCARD number _____ Card Exp. Date: _____	
Signature of Card Owner _____ CSV Code: _____	
<b>* Annual dues are payable in May each year. For new members, the dues for the second year will be prorated by the number of months until the next May, bringing them into alignment with the rest of the members.</b>	

I hereby apply for regular or associate membership as applicable. I agree to abide by the rules of the Association and to conduct my tax practice in strict conformity to the Code of Ethics and Rules of Professional Conduct. I understand that the annual dues are \$90.00.

Signature of Applicant (required) \_\_\_\_\_ Date \_\_\_\_\_



# Oregon Association of Tax Consultants New Membership Application

Phone: 503-726-0100  
Email: [director@oatc-oregon.org](mailto:director@oatc-oregon.org)  
Web site: <http://www.oatc-oregon.org>

Mail to: 3075 SE Century Blvd., Suite 110  
Hillsboro, OR 97123-8187  
FAX: 503-726-0101

Date Received: Amount:	Control Number:	Notes:
---------------------------	-----------------	--------

## What is the Oregon Association of Tax Consultants?

The Association, formed in 1972, is open to all tax practitioners in Oregon and other states. The purpose of the Association is to organize tax practitioners to work toward the common goals of protecting our right to practice and to provide the education and guidance to better serve our clients.

The Oregon Association of Tax Consultants (OATC) is not associated with any school or other profit-making group. OATC exists only to provide benefits to the taxpaying public, and to the tax professionals of Oregon.



## Goals:

1. Provide consumer protection for the Oregon taxpayer through a quality educational program for our members.
2. Promote high standards of ethical conduct among tax professionals.
3. Provide input to Oregon state agencies regarding the needs of our profession.
4. Promote awareness to the taxpaying public of the education and licensing requirements in the State of Oregon.
5. Keep our membership informed of legislative measures that may have an effect on our profession.
6. Promote awareness in the State Legislature of the needs and desires of the Tax Professionals in the State of Oregon.

## OATC Chapters:

Your membership in a local chapter provides convenient educational seminars, a chapter newsletter and website, and association with fellow tax practitioners in your area.

- **Blue Mountain Chapter** – Northeastern Oregon
- **Central Oregon** – Sisters, Burns, Redmond and Bend
- **Clackamas Chapter** – South Portland and Clackamas
- **Jackson County Chapter**
- **Lane County Chapter**
- **Mid-Columbia Chapter** – The Dalles, Hood River and surrounding areas
- **Mid-Willamette Chapter** – Albany, Corvallis, Lebanon and surrounding areas
- **Portland Chapter**
- **Tualatin Valley Chapter** – Northwest Oregon, Hillsboro west to the coast and north to the Columbia River
- **Westside Chapter** – Southwest Portland and Washington County