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Measure HB 2338: Creates a new tax professional certification previously know as Certified Tax Aide.  
Now we would be amendable to change to R.T.A. Registered Tax Aide.

We were approached by a group of our members who were concerned about the shortage of tax folks and those who wanted to work in the tax preparation business who might have a hard time passing the 80 course and test. Our position was that anyone who wanted to do taxes in Oregon needed to have at least some basic training and education. If we had no education requirement, that would be a crush to the Licensed Tax Preparers who are required to take 80 hours of education, pass a State Test & receive continuing yearly education. Frankly, when I first heard the idea, I was totally against it, as I felt that those who wanted to have a career in tax preparation should have some "skin in the game". Without having any education just seemed ridiculous to me. We were also approached by the Oregon Board of Tax Practitioners (OBTP), Laura Kardokus, Exec Director and the Oregon Association of Tax Preparers (OATC), both indicated that they would also like to see a position created to do entry level tax work.

Thus, both myself and Colleen Barbee, met with Laura Kardokus and Joanne Vetter, President of OATC and started discussions on what this position would look like. I was told that other organizations had been invited to join in our discussions, but no others came to the table. We met and all involved shared what we believed was a good compromise to a position which would be a training position; they would have to have 40 hours of education and if they couldn't pass the exam, would go on to work under a licensed Tax Consultant, or Enrolled Agent and still be required to obtain continuing education hours per year, as all licensed professional must do. This is very much for the public's protection, so no one out there is operating without some much needed education and training hours.

I am very much against the amendments as proposed by the OAIA at this late date. As someone who does many tax returns during the tax season, I'm wondering when they would have time to go over the basics with a new employee during the tax season. I do know that CPA's & PA's employee people that are not required to take even a minimal education class. However, I do not believe that these employees even sign their own returns, but are signed by their employers. I'm not sure how this helps them to advance in our tax world. Our goal was to hire someone, given them some basic tax education, and who would want to go on and improve their skills and position by learning and testing for future job placements, which would truly help our public citizens to have a better selection of preparers to choose from.

I strongly recommend HB2338 as proposed by the creators of the bill who put long, arduous hours into what we feel is best for the public as well as our professional positions. Our organizations represent approximately 1500 members who we try to taken in their opinions and positions and represent them the best we can. Both organizations who helped draft this position, provide many hours of quality education and are very concerned about the education level of those doing taxes.

Thank you for your attention to this matter

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