

# CITY OF ASHLAND



## Application for Economic Development, Cultural, Tourism and Sustainability Grants

\*\*\*\*DUE NO LATER THAN 4:00 pm March 22, 2017\*\*\*\*

**One (1) single sided, signed hard copy to  
NO STAPLES PLEASE**

In an envelope titled:

**City of Ashland**

**Attn: Diana Shippet, Administration Department**

**Grant Application**

**20 East Main Street, Ashland, OR 97520**

|                               |  |  |              |
|-------------------------------|--|--|--------------|
| <b>Applicant/Organization</b> | Southern Oregon Bookkeepers Association  |  |              |
| <b>Mailing Address</b>        | 1701 Siskiyou Blvd #3, Ashland OR 97520  |  |              |
| <b>Contact Name</b>           | Audrey Isbell  | <b>Contact Phone #1</b>                  | 541-244-2606 |
| <b>Email #1</b>               | <a href="mailto:president@sobookkeepers.org">president@sobookkeepers.org</a>         |  |              |
| <b>Contact Name #2</b>        | Tracy Baird  | <b>Contact Phone #2</b>                  | 541-414-3147 |
| <b>Email #2</b>               | <a href="mailto:vicepresident@sobookkeepers.org">vicepresident@sobookkeepers.org</a> |  |              |
| <b>Federal Tax ID</b>         | ██████████   | <b>IRS Class (Exemption)</b>             | 501(c)(3)    |
|                               |  |  |              |
|                               |  | <b>Total Grant Request (\$5,000 min)</b> | \$30,000.00  |

### Application Submittal Checklist

**In addition to the completed application form to be mailed and emailed, all submittals must contain the following;**

1. List of all board members, their occupations, and years on the board;
2. Organizational client demographic profile;
3. Grant program budget (for activities/programs/events that are part of this grant application);
4. Organization 501(c) letter verifying your no-profit status;
5. Organization corporate bylaws;
6. Organization's most recent Form 990 IRS filing (summary page only);
7. Organization's previous year financial statement summarizing expenses and revenues.

## Application for Economic Development, Cultural, Tourism and Sustainability Grants

1. Briefly describe the purpose and objectives of your organization and mission statement (*please limit to approximately 500 words*)

Southern Oregon Bookkeepers Association (SOBA) is a 501(c)(3) non-profit organization whose mission is to enhance the education and networking resources of bookkeepers in southern Oregon and their clients. Our focus is on professional development and education, finance education, and professional collaboration, filling many specific financial and educational needs within the Rogue Valley community and southern Oregon region. By offering these resources, SOBA will improve the health of local businesses, thus creating local jobs and improving our local economy.

SOBA directly contributes to Ashland's economic development and sustainability. Per Ashland's "Economic Development Strategy," SOBA contributes to strategy number one (specifically 1.1 & 1.4) "Assist local existing and emerging businesses stabilize and grow." Currently, 40% of all business and nonprofit organizations will be victims of occupational fraud, bookkeeping fraud being the most frequent. 40% is likely smaller than reality due to nonprofit leaderships' hesitancy to report fraud to the authorities; as they are concerned about their reputation to manage their donors' funds. SOBA strives to reduce the incidences of bookkeeping fraud by educating bookkeepers and leadership to act to mitigate fraud. SOBA also requires its members to participate in a rigorous application process and background check.

Even more damaging to business and nonprofit organizations than bookkeepers who steal, are the population of underqualified bookkeepers who offer their services as experienced bookkeepers. SOBA seeks to distinguish between bookkeepers of varying degrees of experience, and to offer bookkeepers of all levels the opportunity to improve their skills. SOBA provides easy access for leadership to query SOBA's membership for bookkeeping professionals who are the most suited to address the bookkeeping needs of the organization. SOBA hosts and maintains a dynamic website ([sobobookkeepers.org](http://sobobookkeepers.org)) in which members can build profiles and present their verified areas of expertise within the accounting industry.

In addition to education specifically related to fraud prevention, SOBA also offers ongoing education opportunities on a variety of other topics to assist both local bookkeepers and business and nonprofit leadership from every industry. By educating our local bookkeepers and leadership, it enables these professionals to make more educated decisions, thus promoting better business health overall.

2. Reference the list of eligible activities provided in the 2012 Policy for Economic, Cultural, Tourism, and Sustainability Grant (page 10) to briefly describe how the City grant would be used and how your activities meet the eligibility criteria (*please limit to approximately 1,000 words*)

The grant award through the Economic Development category would allow 1) SOBA to hire a part-time Executive Director (ED) to implement, administer & promote our mission, and 2) to enhance our annual Fraud Prevention Fair that we offer as a free educational event for businesses to learn how to identify the leading indicators and the prevention of internal theft.

Currently, SOBA is operated by established and very busy business members of Ashland, Medford and Grants Pass communities. The board of directors operates and governs the all activities and its membership and affiliates aide in voluntary support as needed. Utilizing the Economic Development award of this grant, SOBA would hire a highly-qualified professional would be responsible for:

1. Processing membership applications and renewals, as well as orienting and adding value to SOBA's current membership;
2. Promoting awareness of SOBA and its members within the business community in outreach activities to encourage an ethical and integrity-driven local economy;
3. Organizing, promoting and hosting SOBA's social and educational events, with an emphasis in partnering and supporting local businesses;
4. And finally, but not limited to, evaluating and communicating with the SOBA Board of Directors (BOD) regarding the progress and accomplishments of SOBA, so that the BOD can more effectively guide SOBA with the intent to sustain and grow SOBA's mission throughout the southern Oregon region.

In previous years, SOBA has hosted an Annual Fraud Event during International Fraud Awareness month in March, with a single guest speaker whose expertise educates on general business fraud. This year, on March 18, 2017, SOBA evolved this event into a half-day Fraud Prevention Fair (FPF) a vendor and speaker fair, offering sponsors that specialize in fraud prevention and awareness an opportunity to educate the public on the key indicators of internal fraud and theft at a business or workplace. The SOBA BOD sought local community business participation, statewide affiliations, and global sponsorships, and by the time of this writing secured participation from LegalShield, Home Instead Senior Care, Farmhouse Networking, Medford Police Department, Booksguard, TSheets, Sage, Bill.com, and Intuit QuickBooks, and several others. Utilizing the Economic Development award of this grant, SOBA's goal for the 2018 FPF is to:

1. Secure a full-day vendor fair with several guest speakers and a well-known keynote specialist, bringing people from outside of the area to educate inhabitants in southern Oregon about leading key indicators of fraud, theft, embezzlement and hacking;
2. Advertise the Fraud Prevention Fair through media and social media, where most people gain their knowledge on local businesses and social activities;
3. Contribute toward an adequate event space that has a main stage area for speakers and can host vendor tables with ample room for visitors to interact;
4. Ensure SOBA-branded educational materials and products so that visitors have information and contact resources for proactive prevention in their business.

2.1. If your grant request is for date specific events, programs or activities, please complete the following table

| Program/Event Title   | Anticipated Dates of Event |                | Funding Request |
|-----------------------|----------------------------|----------------|-----------------|
|                       | Start                      | End            |                 |
| Executive Director    | July 1, 2017               | June 30, 2018  | \$ 25,000.00    |
| Fraud Prevention Fair | March 17, 2018             | March 17, 2018 | \$ 5,000.00     |
|                       |                            |                | \$              |
|                       |                            |                | \$              |
|                       |                            |                | \$              |

3. Which grant category (or categories) does your request fall under? (please check all that apply)

| <input checked="" type="checkbox"/>  | Grant Category       | Grant Request |
|--|----------------------|---------------|
| <input checked="" type="checkbox"/>  | Economic Development | \$30,000.00   |
| <p>Per Economic Development eligible activities (page 10), please explain how your activities qualify (please limit to approx. 250 words):</p> <p>SOBA's intent of hiring a part-time Executive Director and hosting a Fraud Prevention Fair will do more for educating, developing and stabilizing the local economy. Any successful form of economic development will encourage cultural diversity and growth in tourism, and SOBA's goal is to provide all businesses an opportunity for financial education and reliable bookkeeping. By hiring an Executive Director, our outreach activities will more actively promote awareness of SOBA and its members within the business community to encourage an ethical and integrity-driven local economy. Indeed, while many observe culture as merely an ethnic demographic or lifestyle, SOBA observes it to be more of an environment in which we can facilitate awareness and diversity to all businesses and all business owners. Creating a culture of financial knowledge and health will, in turn, increase the prosperity of local businesses and increase the value of tourists throughout the year. Tourism is often mistaken as travelers from outside our area, but as our most recent economic downturn demonstrated, tourism is more important from our locals that choose to regularly fuel our small businesses and that choose stay-cations that promote the prosperity and longevity of our local businesses. SOBA's mission benefits all categories considered with the grant.</p> |                      |               |
|  |                      |               |

|  |                       |    |
|--|-----------------------|----|
|  | <b>Cultural</b>       | \$ |
| Per Cultural Development eligible activities (page 11), please explain how your activities qualify ( <i>please limit to approx. 250 words</i> ): |                       |    |
|  | <b>Tourism</b>        | \$ |
| Per Tourism eligible activities (page 11), please explain how your activities qualify ( <i>please limit to approx. 250 words</i> ):              |                       |    |
|  | <b>Sustainability</b> | \$ |
| Per Sustainability eligible activities (page 11), please explain how your activities qualify ( <i>please limit to approx. 250 words</i> ):       |                       |    |

4. If you do not receive the full amount of your request, describe how your organization would use a smaller amount of funds in each of the categories being applied for (*please limit to approximately 250 words*)

While we humbly hope for the full amount of \$30,000 to fulfill both of our goals, a smaller amount would be equally beneficial in procuring the services of local businesses that could help us in a similar manner. Although the services would be an intermittent, rather than continual, effort that would still require the volunteer board to provide the administration, the partnership with local businesses can aid us in an increase of marketing efforts to promote SOBA in community outreach and develop education opportunities with local businesses, like the Fraud Prevention Fair.

5. Using the attached City of Ashland Policy for Economic, Cultural, Tourism and Sustainability Grants, Section III (page 12), please explain how you will measure success or desired outcomes. *(please limit to approximately 250 words)*

Measuring the success or desired outcome would be immediately evident upon hiring an experienced professional as an Executive Director by way of:

1. a continual promotion of SOBA's social and educational events, including the Fraud Prevention Fair;
2. a steady growth of additional members and business affiliates;
3. an active increase in donations and grants, and a refocus of the Board of Directors to securing and stewarding donors and foundations; and
4. a presence on community bulletin boards, advertising journals, social media, and local meet-ups for outreach activities.

A sum of the amount requested to a small nonprofit such as ours would have transparent and immediate outcome.

Thank you for your time and efforts in preparing this information for consideration by the Grants Committee.

By signing below you certify that:

You, the grantee, understand that you must comply with all federal, state and local requirements applicable for the activities funded by this grant. Award of a grant by the City does not waive the grantee's obligation to obtain, at grantee's sole expense, all applicable permits that may be required for grantee's program or project.

And, that a grant may be conditioned on submission or other approvals to the City of a Certificate of General Liability Insurance in the amount of up to **\$1,000,000** naming the City of Ashland, its officers and employees as additional insured.

And, that you the undersigned have legal authority to submit the above information on behalf of the organization named above.

Name (print) Tracy Baird

Name (signature) Tracy Baird

Title Vice President



## City of Ashland Customer Demographic Profile

The primary goal of the grant award process is to allocate funds to organizations that are providing economic, tourism, cultural and/or sustainability programs, services or events that reach a demographically diverse customer base, both locally and from outside our region. The following questions are intended to provide guidance for the possible types of customer demographics that would help the grant review/award sub-committee understand the customer types that your application would likely reach.

***\* If your organization tracks this data or other related data, in other formats, please feel free to submit that format directly. This form is provided as a template and is not required to be completed in this format, but customer demographic information is an application submittal requirement.***

Organization Name: Southern Oregon Bookkeepers Association

Program/Event Name: Fraud Prevention Fair

For the Twelve month period of: July 1, 2017 to June 30, 2018

**I. Customer Age (percentage)**

|                      |             |
|----------------------|-------------|
| Youth 0 to 17 years  | 0%          |
| Adult 18 to 39 years | 45%         |
| Adult 40 to 64 years | 50%         |
| Adult 65 and over    | 5%          |
| Unknown              | 0%          |
| <b>Total</b>         | <b>100%</b> |

**II. Staff Residence (percentage)**

|              |             |
|--------------|-------------|
| Ashland      | 0-100%      |
| Rogue Valley | 100%        |
| Other        | 0%          |
| <b>Total</b> | <b>100%</b> |

**II. Customer Residence (percentage)**

|                               |     |
|-------------------------------|-----|
| Ashland                       | 20% |
| Rogue Valley                  | 70% |
| Other (within 50 miles)       | 5%  |
| Other (greater than 50 miles) | 5%  |

**III. Of the Customers identified above, what percent do you estimate stayed overnight to attend your program, service or event?** 10-15% for outside area guest speakers at our Fraud Prevention Fair in March



**CITY OF ASHLAND  
GRANTS PROGRAM BUDGET**

Please use this form to identify costs associated with the program, activity or event that you are requesting funds for. This form is provided as a template to use. If your organization tracks grant related financials in a different reporting format, please submit in that format if you choose.

APPLICANT/ORGANIZATION: Southern Oregon Bookkeepers Association

PROGRAM/EVENT TITLE: Executive Director Initiative / Fraud Prevention Fair event

PROJECT PERIOD: July 1, 2017 to June 30, 2018

| <b>REVENUE</b>  |                      |  |
|---|----------------------|--|
| City of Ashland Grant Funds                                       |                      | \$ 30,000  |
| Jackson County Funds /Identify:                                   |                      | \$   |
| Other State or Federal Funds /Identify:                           |                      | \$   |
| Other Funds /Identify Membership Dues and Donations               |                      | \$ 6,500   |
| Other Funds (cont) Education Event Sponsorships                   |                      | \$ 5,500   |
|   |                      | \$   |
| <b>TOTAL REVENUE</b>  |                      | <b>\$ 42,000</b>   |
| <b>EXPENDITURES</b>   |                      |  |
| <b>A. PERSONAL SERVICES (List costs by job title or function)</b> |                      |  |
| Total Salaries  | % of time to project | \$ 27,000  |
| 1. Executive Director   | 100%                 | Total Payout cost, including worker's comp insurance, employer taxes, etc. |
| 2. _____  | _____ %              |  |
| 3. _____  | _____ %              |  |
| 4. _____  | _____ %              |  |
| Total Benefits  |                      | \$ 0   |
| 1. _____  |                      |  |
| 2. _____  |                      |  |
| 3. _____  |                      |  |
| 4. _____  |                      |  |
| <b>TOTAL PERSONAL SERVICES</b>                                    |                      | <b>\$ 27,000</b>   |
| <b>B. MATERIALS &amp; SERVICES:</b>                               |                      |  |
| Advertising & Member Retention                                    |                      | \$ 3,500   |
| Outreach & Promotion Expenses                                     |                      | \$ 1,000   |
| Liability and D&O Insurance                                       |                      | \$ 1,500   |
| Other Admin and Program Expenses                                  |                      | \$ 500   |
| Fraud Prevention Fair: Guest Speakers & Lodging                   |                      | \$ 3,500   |
| Fraud Prevention Fair: Promotional & Educational Materials        |                      | \$ 1,000   |
| Fraud Prevention Fair: Advertising & Media Coverage               |                      | \$ 2,500   |
| Fraud Prevention Fair: Venue & Catering                           |                      | \$ 1,000   |
| Fraud Prevention Fair: Liability Event Insurance                  |                      | \$ 500   |
|   |                      | \$   |
| <b>TOTAL MATERIALS &amp; SERVICES</b>                             |                      | <b>\$ 15,000</b>   |
| <b>TOTAL EXPENDITURES</b>   |                      | <b>\$ 42,000</b>   |

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 21 2014**

Employer Identification Number:

[REDACTED]

DLN:

[REDACTED]

SOUTHERN OREGON BOOKKEEPERS  
ASSOCIATION  
C/O POLYMATH LLC  
1701 SISKIYOU BLVD STE 3  
ASHLAND, OR 97520

Contact Person:  
CUSTOMER SERVICE ID# 31954

Contact Telephone Number:  
(877) 829-5500

Accounting Period Ending:  
December 31

Public Charity Status:  
170(b)(1)(A)(vi)

Form 990 Required:  
Yes

Effective Date of Exemption:  
July 7, 2011

Contribution Deductibility:  
Yes

Addendum Applies:  
Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,



Director, Exempt Organizations

Letter 947

SOUTHERN OREGON BOOKKEEPERS

ADDENDUM

You formed July 7, 2011, and filed your Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code, on July 6, 2013. You failed to file a required annual return or notice (Form 990, Form 990-EZ, Form 990-PF or Form 990-N) for three consecutive years after you were formed and while your application was pending. As a result, your tax-exempt status was automatically revoked on May 15, 2014, the due date of your third year return or notice. We are treating your Form 1023 as an application for reinstatement and are recognizing your exemption as reinstated on the same day it was automatically revoked. As a result, you are recognized as tax-exempt continuously from the effective date of exemption as reflected at the top of this letter.

ARTICLES OF INCORPORATION OF  
SOUTHERN OREGON BOOKKEEPERS ASSOCIATION  
an Oregon Nonprofit Corporation

ARTICLE 1

The name of this corporation (the "Corporation") is Southern Oregon Bookkeepers Association, and its duration shall be perpetual.

ARTICLE 2

The Corporation is a public benefit corporation.

ARTICLE 3

The purpose for which the Corporation is organized is a professional organization dedicated to improving the local economy by enhancing the education and networking resources of bookkeepers in Southern Oregon and their clients while mitigating the risk of fraud by providing a resource for small business & nonprofits to find competent & ethical bookkeeping professionals. The association's focus is on professional development and education, finance education, and professional collaboration, filling many specific financial and educational needs within the Rogue Valley community and Southern Oregon region.

ARTICLE 4

The name, street address and business office of the initial registered agent is:

Ingrid Edstrom

Polymath, LLC.

1701 Siskiyou Blvd. #3

Ashland, OR 97520

The mailing address of the registered agent is:

Ingrid Edstrom

Polymath, LLC.

1701 Siskiyou Blvd. #3

Ashland, OR 97520

ARTICLE 5

The name and address of the sole incorporator and the principal office address of the Corporation is:

Ingrid Edstrom

1701 Siskiyou Blvd. #3

Ashland, OR 97520

#### ARTICLE 6

The address where notices may be mailed is as follows:

Ingrid Edstrom

Polymath, LLC.

1701 Siskiyou Blvd. #3

Ashland, OR 97520

#### ARTICLE 7

The Corporation will not have members.

#### ARTICLE 8

The affairs of the Corporation shall be managed by a Board of not less than four (4), and not more than eleven (11) directors who shall administer and distribute the property held by the Corporation in the manner that best serves the mission of the Southern Oregon Bookkeepers Association.

#### ARTICLE 9

A. The Corporation is organized to carry out charitable, educational, and networking activities. In pursuit of such purposes, the Corporation shall be authorized to engage in any lawful activity for which corporations may be organized and operated under the Oregon Nonprofit Corporation Act, including:

- (1) Administer property donated to the Corporation in support and furtherance of its mission.
- (2) Distribute property for such purposes in accordance with the terms of gifts, bequests or devises to the Corporation in accordance with determinations by the Board of Directors pursuant to these Articles and the Bylaws of the Corporation;
- (3) Distribute property to qualified charitable and educational organizations and to governmental units;

and

(4) Do and perform such acts as may be necessary or appropriate in carrying out the foregoing purposes of the Corporation and, in connection therewith, to exercise any of the powers granted to nonprofit corporations by the Oregon Nonprofit Corporation Act, as amended from time to time, consistent with the Corporation's status as an organization which is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended from time to time, and to which contributions are deductible under Section 170(c)(2), 2055(a)(2), and 2522(a)(2) of the Internal Revenue Code of 1986, as amended from time to time.

B. No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the preceding paragraph A of this Article.

C. No part of the activities of the organization shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the organization shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office.

D. Notwithstanding any other provision of this document, the organization shall not carry on any other activities not permitted to be carried on (a) by an organization exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or (b) by an organization, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code, or corresponding section of any future federal tax code.

E. The Corporation is intended to be an organization which is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986, and which is a public charity. All terms and provisions of these Articles and all operations of the Corporation shall be construed, applied and carried out in accordance with such intent. For purposes of these Articles:

(1) "Public charity" means a qualified charitable organization which is not a private foundation within the meaning of Section 509(a)(1), (2) or (3) of the Internal Revenue Code of 1986;

(2) "Qualified charitable organization" means an organization which is organized for religious, charitable, educational and/or scientific purposes and qualified as exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986, and to which contributions are deductible under Section 170(c)(2), 2055(a)(2) and 2522(a)(2) of the Internal Revenue Code of 1986;

(3) "Religious, charitable, educational and scientific purposes" means those purposes authorized under Section 501(c)(3) of the Internal Revenue Code of 1986, which may be accomplished by the Corporation as a public charity under the Internal Revenue Code of 1986; and

(4) Reference to any Section of the Internal Revenue Code of 1986 includes the corresponding provision or provisions then in effect of any subsequent federal tax laws.

#### ARTICLE 10

The Corporation shall be managed by its Board of Directors pursuant to these Articles, the Bylaws of the Corporation, and the Oregon Nonprofit, Corporation Act, as amended from time to time.

#### ARTICLE 11

The Corporation may be dissolved at any time by the affirmative vote of at least three-fourths (3/4ths) of its directors at any meeting for which 30 days' written notice of consideration of such action is duly given. The dissolution of the Corporation (whether by the transfer of substantially all of its assets, or otherwise) shall be accomplished consistent with the intent that the assets be held and used for the purposes of a public charity, and such termination shall not be effected so as to cause any tax to be imposed under Section 507(a) of the Internal Revenue Code of 1986. Subject to the foregoing sentence, in the event of dissolution of the Corporation for any reason, the property then held shall (after payment or provision for payment of all liabilities) be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.

#### ARTICLE 12

A director or uncompensated officer of the Corporation shall not be liable to the Corporation for monetary damages for conduct as a director or officer except to the extent that such exemption from liability or limitation thereof is not permitted under the Oregon Nonprofit Corporation Act, as amended from time to time. No repeal of or amendment to this Article shall adversely affect any right or protection of a director or uncompensated officer of the Corporation existing at the time of such repeal or amendment.

#### ARTICLE 13

To the fullest extent not prohibited by the Oregon Nonprofit Corporation Act, as it exists on the date hereof, or as hereafter amended, the Corporation shall indemnify any person who is made or threatened to be made a party to an action, suit, or proceeding, whether civil, criminal, administrative, investigative, or otherwise (including an action, suit, or proceeding by or in the right of the Corporation), by reason of the fact that the person is or was a director of the Corporation, and may indemnify any person who is made or threatened to be made a party to an action, suit, or proceeding, whether civil, criminal, administrative, investigative, or otherwise (including an action, suit, or proceeding by or the right of the Corporation), by reason of the fact that the person is or was an officer, employee, or agent of the Corporation. This article shall not be deemed exclusive of any other provisions or insurance for the indemnification of directors, officers, employees, or agents that may be included in any statute, bylaw, agreement, resolution of shareholders or directors, or otherwise, both as to action in any official capacity, and action in any other capacity while holding office, or while an employee or agent of the Corporation.



ARTICLE 14

These Articles may be amended by the vote of a majority of the directors of the Corporation at any meeting for which thirty (30) days written notice of consideration of such action shall be duly given; Provided, however, that Article 7 and Article 9 may be amended only to the extent that future changes in the applicable provisions of the Internal Revenue Code and the Regulations pertaining thereto make such changes necessary or desirable in order for the Corporation to preserve its status as a public charity as that term is defined in Article 9.

The undersigned declares under penalty of perjury that she has examined the foregoing and, to the best of her knowledge and belief, it is true, correct and complete.

Dated this 13<sup>th</sup> Day of May, 2013.

Ingrid Edstrom, Incorporator

Person to Contact about this filing:

Name: Ingrid Edstrom

Daytime Phone #: 541-482-4849

## BYLAWS OF THE

### SOUTHERN OREGON BOOKKEEPERS ASSOCIATION

An Oregon Nonprofit Corporation

#### ARTICLE I

##### Formation and Membership

Section 1.1 Name: The name of the corporation is Southern Oregon Bookkeepers Association, ("the corporation").

Section 1.2 Mission Statement: The Corporation's mission is to enhance the education and networking resources of bookkeepers in Southern Oregon and their clients. The association's focus is on professional development and education, finance education, and professional collaboration, filling many specific financial and educational needs within the Rogue Valley community and Southern Oregon region.

Section 1.3 Membership: The Corporation shall not have voting members but it shall establish one or more classes of nonvoting, supportive members with rights and privileges to be bestowed by the Board of Directors.

#### ARTICLE II

##### Board of Directors

Section 2.1 Management: The affairs of the Corporation shall be managed by a Board of Directors, except to the extent such authority is delegated by the Board of Directors to one or more of its officers or committees either generally or with respect to specific matters. Each member thereof individually shall be known as a director.

Section 2.2 Number: The Board of Directors shall consist of a variable Board of between four and eleven directors. Initially, the Board will consist of 5 directors. The following persons shall comprise the initial Board of Directors and each director shall serve until his or her successor is elected pursuant to Section 2.3 of these Bylaws:

Ingrid Edstrom: President - Director  
Micah Pitts: Vice President - Director  
Justin Botillier: Secretary/Treasurer - Director  
Audrey Isbell: Membership Director  
Melanie Madden: Director

Section 2.3 Appointment of Directors and Terms of Office: The directors other than the initial directors, shall be elected by the Board of Directors and shall hold office for a term of two (2) years, commencing immediately following the annual meeting of the Board of Directors in the year of election (other than the initial Board of Directors, whose two (2) year terms shall commence immediately following the organizational meeting of the corporation), and continuing until his or her successor is elected, pursuant to this Section 2.3. Elections years for the successors of the initial directors shall be staggered as follows: President and Secretary/Treasurer elections in odd years, all other director elections in even years.

Section 2.4 Qualifications of Directors: Any person of the age of eighteen (18) years or older with an interest in the work of the corporation shall be eligible for Board membership.

Section 2.5 Directors' Standard of Conduct: A director shall discharge the duties of a director, including the director's duties as a member of a committee, if any, in good faith, with the care that an ordinarily prudent person in a like position would exercise under similar circumstances, and in a manner the director reasonably believes to be in the best interests of the corporation.

Section 2.6 Directors - Conflict of Interest: A conflict of interest transaction is a transaction with the corporation in which a director of the corporation has a direct or indirect interest. Any conflict of interest transaction shall be subject to the provisions imposed by the Oregon Nonprofit Corporation Code.

Section 2.7 Directors - Removal

(a) Directors may be removed from office pursuant to a vote of not less than two-thirds of the currently serving directors.

(b) Successors to directors who have been removed shall be selected as set forth in Section 2.8 of these Bylaws.

Section 2.8 Vacancies: A vacancy on the Board of Directors shall exist upon the death or resignation of a director, or upon removal of any director. The Board of Directors, acting at any meeting, may fill a vacancy on the Board of Directors for the unexpired portion of the term in the manner provided in Section 2.3 of these Bylaws.

Section 2.9 Annual Meeting of Directors: An annual meeting of the directors shall be held during the month of December of each calendar year. At the annual meeting, the directors shall approve the budget established for the upcoming year, and shall affirm the election or appointment of directors to serve until the next annual meeting of the corporation and shall issue a report to the nonvoting members of the corporation.

Section 2.10 Regular Meetings: Regular meetings of the Board of Directors shall be held at such times as the Board of Directors may determine by resolution. The Secretary shall mail or otherwise deliver a copy of such resolution to any director who was not present when it was adopted, but no further notice of such regular meetings need be given.

Section 2.11 Special Meetings: Special meetings of the Board of Directors may be called by the President or upon written request by at least two (2) of the directors in office setting forth the business they wish to have conducted at the special meeting. Notice of special meetings shall be given at least five (5) days by a writing delivered personally, by fax, by mail or any other manner reasonably calculated to provide the required notice to each director.

Section 2.12 Place of Meetings; Other Means of Communication: All meetings of the Board of Directors shall be held at such place as is designated in the notice of meeting. Any or all directors may participate in a regular or special meeting by, or conduct the meeting through, the use of any means of communication by which all directors participating in the meeting may simultaneously hear each other during the meeting. A director participating in a meeting by such means shall be deemed present in person at the meeting.

Section 2.13 Quorum: A majority of the directors in office shall constitute a quorum for the transaction of business. A majority of those directors present may, in the absence of a quorum, adjourn the meeting but may not transact any business.

Section 2.14 Action Without a Meeting: Any action required or permitted to be taken at any meeting of the Board of Directors or by any Board committee may be taken without a meeting if a consent in writing, setting forth the action taken, shall be signed by all persons entitled to vote with respect to the subject matter thereof. Such consent shall have the same force and effect as a unanimous vote.

### ARTICLE III

#### Officers

Section 3.1 Designation and Qualification: The officers of the corporation shall consist of the following:

President

Vice- President

Secretary / Treasurer

Officers may be directors, but need not be. Directors serving as officers shall retain their right to vote as directors on matters presented to the Board of Directors. Officer positions are required to be filled by bookkeepers in good standing with the organization, having gone through reference and background check requirements.

Section 3.2 Appointment, Terms and Vacancy:

(a) Officers shall be elected by the Board of Directors at each annual meeting to serve until the next annual meeting.

(b) A vacancy in any office because of death, resignation, removal, disqualification or otherwise shall be filled by the Board of Directors, at any meeting, for the unexpired portion of the term in the manner described in these Bylaws for regular appointments to such office.

Section 3.3 Resignation and Removal: An officer may be removed, either with or without cause, by majority vote of the Board of Directors. An officer may resign at any time by giving written notice to the Board of Directors, the President or the Secretary.

Section 3.4 President: The President shall preside at all meetings of the Board of Directors. The President shall have such other powers and perform such other duties as the Board of Directors or these Bylaws may prescribe.

Section 3.5 Vice-President: The Vice-President shall perform the duties of the President in the absence of the President. The Vice-President shall have such other powers and perform such other duties as may be designated by the Board of Directors.

Section 3.6 Secretary/Treasurer: The Secretary shall cause minutes to be kept of all meetings of the Board of Directors, shall cause appropriate notices to be given in accordance with these Bylaws, shall perform the customary duties pertaining to the office of Secretary, and shall perform such other duties as the Board of Directors or these Bylaws may prescribe including, but not limited to, preparing the annual report of the corporation. The Secretary/Treasurer shall also perform the customary duties pertaining to the office of Treasurer, and shall perform such other duties as the Board of Directors or these Bylaws may prescribe.

Section 3.7 Assistants: The Board of Directors may appoint or authorize the appointment of assistants to the Secretary or Treasurer or both. Such assistants may exercise the power of the Secretary or Treasurer, as the case may be, and shall perform such duties as the Board of Directors may prescribe.

Section 3.8 Other Administrative Officers/Committees: The Board of Directors may appoint such additional administrative officers or special committees with such titles and responsibilities as they may deem appropriate. All committees and officers shall serve at the pleasure and discretion of the Board of Directors.

Section 3.9 Compensation: No officer or director of this corporation shall receive compensation for their service on the Board of Directors.

## ARTICLE IV

### Records and Execution

Section 4.1 Records: The Corporation shall maintain adequate and correct books, records and accounts of its business and properties. All of such books, records and accounts shall be kept at a designated place of business.

Section 4.2 Inspection: All books, records and accounts at the corporation, and the original or a certified copy of the Articles of Incorporation, the Bylaws and any amendments thereto, shall be open to inspection by the directors in the manner and to the extent required by law.

Section 4.3 Signature Authority: All checks, drafts or other orders for payment of money, notes or other evidences of indebtedness issued in the name of or payable to the corporation shall be signed or endorsed by such person or persons and in such manner as shall be determined by resolution of the Board of Directors.

Section 4.4 Fiscal Year: The fiscal year of the corporation shall be a calendar year.

Section 4.5 Execution of Documents: Except as otherwise provided in these Bylaws, the Board of Directors may authorize in writing any officer or agent to enter into any contract or execute any instrument in the name of and on behalf of the corporation. Such authority may be general or confined to specific instances.

## ARTICLE V

### Indemnification, Insurance and Limitation of Liability

Section 5.1 Indemnification: The corporation shall indemnify to the fullest extent not prohibited by law any Indemnified Person (as hereinafter defined) who was or is a party or is threatened to be made a party to any Proceeding (as hereinafter defined) against all expenses (including attorneys' fees), judgments, fines and amounts paid in settlement actually and reasonably incurred by the Indemnified Person in connection with such Proceeding.

Section 5.2 Advancement of Expenses: Expenses incurred by an Indemnified Person in defending a Proceeding shall in all cases be paid by the corporation in advance of the final disposition of such proceeding at the written request of such Indemnified Person, if the Indemnified Person furnishes the corporation:

(a) A written affirmation of the Indemnified Person's good faith belief that such Indemnified Person is entitled to be indemnified by the corporation under this Article or under any other indemnification rights granted by the corporation to such indemnified Person; and

(b) A written undertaking by or on behalf of such Indemnified Person to repay such advance to the extent it is ultimately determined by a court that such Indemnified Person is not entitled to be indemnified by the corporation under this Article or under any other indemnification rights granted by the corporation to such Indemnified Person.

Such advances shall be made without regard to the Indemnified Person's ability to repay such advances and without regard to the Indemnified Person's ultimate entitlement to indemnification under this Article or otherwise.

#### Section 5.3 Definitions.

(a) The term Indemnified Person shall mean any person who is or was (I) a director, officer, member of a committee, employee or, to the extent authorized by the Board of Directors in the specific case, an agent of the corporation, or (II) serving at the request of the corporation as a director or officer of another corporation, partnership, joint venture, trust or other enterprise, whether or not serving in such capacity at the time any liability or expense is incurred for which indemnification or advancement of expenses can be provided under this Article.

(b) The term Proceeding shall include any threatened, pending or completed action, suit or proceeding, whether brought in the right of the corporation or otherwise and whether of a civil, criminal, administrative or investigative nature, in which an Indemnified Person may be or may have been involved as a party or otherwise by reason of the fact that the person is an Indemnified Person.

Section 5.4 Non-Exclusivity and Continuity of Rights: The indemnification and entitlement to advancement of expenses provided by this Article shall not be deemed exclusive of any other rights to which those indemnified may be entitled under the Articles of Incorporation or any statute, agreement, general or specific action of the Board of Directors, or otherwise, shall continue as to a person who has ceased to be a person described within the definition of Indemnified Person, shall inure to the benefit of the heirs, executors and administrators of such an Indemnified Person and shall extend to all claims for indemnification or advancement of expenses made after the adoption of this Article. The corporation may enter into agreements to indemnify any Indemnified Person.

Section 5.5 Amendments: Any repeal of this Article shall only be prospective and no repeal amendment or modification hereof shall adversely affect the remainder of this Article in effect at the time of the alleged occurrence of any act or omission to act that is the cause of the Proceeding.

Section 5.6 Limitation of Liability: The civil liability of directors, officers and executive board members shall be limited to the fullest extent permitted under the Oregon Nonprofit Corporation Act.

Section 5.7 Insurance: The Corporation shall have the discretion to purchase and maintain in effect a policy or policies of insurance covering any liability of directors, officers, committee members,

employees and agents of the corporation, regardless of whether the corporation would have the power to indemnify such persons against the liability so insured.

## ARTICLE VI

### General Provisions

**Waiver of Notice:** A waiver of notice of any Board of Directors or committee meeting in writing signed at any time by the person entitled to notice shall be equivalent to the giving of the notice. Attendance at a meeting shall constitute a waiver of notice of such meeting, except where the person attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened. Notice of the time and place of holding an adjourned meeting need not be given if such time and place is fixed at the meeting adjourned.

## ARTICLE VII

### Amendments

**Section 7.1 Review:** These Bylaws shall be reviewed by the Board of Directors at least once every three (3) years, and the Board of Directors shall propose amendments it believes necessary or appropriate.

**Section 7.2 Procedure:** These Bylaws may be amended or repealed or new Bylaws adopted only upon receiving the affirmative vote of a majority of the directors of the corporation at any meeting for which thirty (30) days' written notice of consideration of such action shall be duly given

Adopted effective as of this 13<sup>th</sup> day of May, 2013.



## Forms 990 / 990-EZ Return Summary

For calendar year 2015, or tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

### SOUTHERN OREGON BOOKKEEPERS ASSOCIATION



|  |              |                     |
|--|--------------|---------------------|
| <b>Net Asset / Fund Balance at Beginning of Year</b> |              | <u>1,858</u>        |
| <b>Revenue</b>                                       |              |                     |
| Contributions  | <u>5,143</u> |                     |
| Program service revenue                              | _____        |                     |
| Investment income                                    | _____        |                     |
| Capital gain / loss                                  | _____        |                     |
| Fundraising / Gaming:                                |              |                     |
| Gross revenue  | _____        |                     |
| Direct expenses                                      | _____        |                     |
| Net income   | _____        |                     |
| Other income   | _____        |                     |
| <b>Total revenue</b>                                 | <u>5,143</u> |                     |
| <b>Expenses</b>                                      |              |                     |
| Program services                                     | _____        |                     |
| Management and general                               | _____        |                     |
| Fundraising  | _____        |                     |
| <b>Total expenses</b>                                | <u>3,548</u> |                     |
| <b>Excess / (deficit)</b>                            |              | <u>1,595</u>        |
| Changes  | _____        |                     |
| <b>Net Asset / Fund Balance at End of Year</b>       |              | <u><u>3,453</u></u> |

**Reconciliation of Revenue**

|  |              |
|--|--------------|
| Total revenue per financial statements | _____        |
| Less:                                  |              |
| Unrealized gains                       | _____        |
| Donated services                       | _____        |
| Recoveries                             | _____        |
| Other                                  | _____        |
| Plus:                                  |              |
| Investment expenses                    | _____        |
| Other                                  | _____        |
| <b>Total revenue per return</b>        | <u>_____</u> |

**Reconciliation of Expenses**

|   |              |
|---|--------------|
| Total expenses per financial statements | _____        |
| Less:                                   |              |
| Donated services                        | _____        |
| Prior year adjustments                  | _____        |
| Losses                                  | _____        |
| Other                                   | _____        |
| Plus:                                   |              |
| Investment expenses                     | _____        |
| Other                                   | _____        |
| <b>Total expenses per return</b>        | <u>_____</u> |

|             | Beginning    | Balance Sheet<br>Ending | Differences  |
|-------------|--------------|-------------------------|--------------|
| Assets      | <u>1,858</u> | <u>3,453</u>            |              |
| Liabilities | _____        | _____                   |              |
| Net assets  | <u>1,858</u> | <u>3,453</u>            | <u>1,595</u> |

**Miscellaneous Information**

Amended return \_\_\_\_\_  
 Return / extended due date 05/16/16  
 Failure to file penalty \_\_\_\_\_

Form **8879-EO**

### IRS e-file Signature Authorization for an Exempt Organization

OMB No. 1545-1878

For calendar year 2015, or fiscal year beginning \_\_\_\_\_, 2015, and ending \_\_\_\_\_ 20 \_\_\_\_\_

▶ **Do not send to the IRS. Keep for your records.**

▶ **Information about Form 8879-EO and its instructions is at [www.irs.gov/form8879eo](http://www.irs.gov/form8879eo).**

# 2015

Department of the Treasury  
Internal Revenue Service

Name of exempt organization

**SOUTHERN OREGON BOOKKEEPERS  
ASSOCIATION**

Employer identification number

██████████

Name and title of officer

**JUSTIN BOTILLIER  
BOARD PRESIDENT**

#### Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line 1a, 2a, 3a, 4a, or 5a, below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, or 5b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than 1 line in Part I.

|    |  |   |  |    |              |
|----|--|---|--|----|--------------|
| 1a | Form 990 check here ▶ <input type="checkbox"/>               | b | Total revenue, if any (Form 990, Part VIII, column (A), line 12) ..... | 1b | _____        |
| 2a | Form 990-EZ check here ▶ <input checked="" type="checkbox"/> | b | Total revenue, if any (Form 990-EZ, line 9) .....                      | 2b | <u>5,143</u> |
| 3a | Form 1120-POL check here ▶ <input type="checkbox"/>          | b | Total tax (Form 1120-POL, line 22) .....                               | 3b | _____        |
| 4a | Form 990-PF check here ▶ <input type="checkbox"/>            | b | Tax based on investment income (Form 990-PF, Part VI, line 5) .....    | 4b | _____        |
| 5a | Form 8868 check here ▶ <input type="checkbox"/>              | b | Balance Due (Form 8868, Part I, line 3c or Part II, line 8c) .....     | 5b | _____        |

#### Part II Declaration and Signature Authorization of Officer

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2015 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

I authorize Rogue Tax Professionals to enter my PIN ██████████ as my signature  
ERO firm name Enter five numbers, but do not enter all zeros

on the organization's tax year 2015 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2015 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶

Date ▶ 03/23/16

#### Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

██████████  
do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2015 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub. 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶

JUSTIN BOTILLIER EA

Date ▶

03/23/16

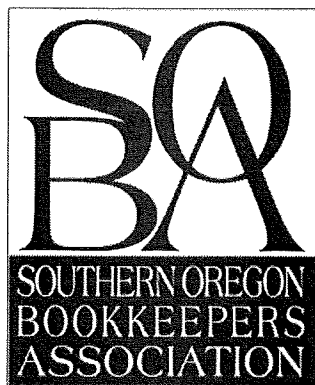
**ERO Must Retain This Form—See Instructions  
Do Not Submit This Form To the IRS Unless Requested To Do So**

For Paperwork Reduction Act Notice, see back of form.

Form **8879-EO** (2015)

# Management Report

Southern Oregon Bookkeepers Association  
For the period ended December 31, 2016



Prepared on  
March 14, 2017

For management use only

## Table of Contents

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# Profit and Loss

January - December 2010

|  | <b>Total</b>      |
|--|-------------------|
| <b>INCOME</b>                            |                   |
| Advertising/Promotion Income             | 1,640.00          |
| Donation Income                          | 155.00            |
| Membership Income                        | 48.00             |
| Affiliate Membership                     | 400.00            |
| Application Fee Income                   | 150.00            |
| Bookkeeper                               | 2,600.00          |
| Intern Memberships                       | 100.00            |
| <b>Total Membership Income</b>           | <b>3,298.00</b>   |
| <b>Total Income</b>                      | <b>5,093.00</b>   |
| <b>GROSS PROFIT</b>                      |                   |
|  | <b>5,093.00</b>   |
| <b>EXPENSES</b>                          |                   |
| Advertising & Promotion                  | 300.00            |
| Event Expense                            | 437.88            |
| Member Retention                         | 42.00             |
| Website                                  | 200.00            |
| <b>Total Advertising &amp; Promotion</b> | <b>979.88</b>     |
| Background Checks                        | 50.00             |
| Bank Charges                             | 99.99             |
| Board Assistant                          | 42.17             |
| Business Licenses & Fees                 | 50.00             |
| Dues & subscriptions                     | 35.00             |
| Insurance                                | 1,103.00          |
| Office Supplies & Expenses               | 39.03             |
| Postage and Delivery                     | 65.00             |
| Printing & Reproduction                  | 30.00             |
| QuickBooks Payments Fees                 | 115.38            |
| Telephone Expense                        | 91.50             |
| <b>Total Expenses</b>                    | <b>2,700.95</b>   |
| <b>NET OPERATING INCOME</b>              | <b>2,392.05</b>   |
| <b>NET INCOME</b>                        | <b>\$2,392.05</b> |

# Balance Sheet

As of December 31, 2010

|                                     | <b>Total</b>      |
|-------------------------------------|-------------------|
| <b>ASSETS</b>                       |                   |
| <b>Current Assets</b>               |                   |
| <b>Bank Accounts</b>                |                   |
| Chase Checking (7507)               | 5,262.17          |
| <b>Total Bank Accounts</b>          | <b>5,262.17</b>   |
| <b>Accounts Receivable</b>          |                   |
| Accounts Receivable (A/R)           | -218.00           |
| <b>Total Accounts Receivable</b>    | <b>-218.00</b>    |
| <b>Total Current Assets</b>         | <b>5,044.17</b>   |
| <b>TOTAL ASSETS</b>                 | <b>\$5,044.17</b> |
| <b>LIABILITIES AND EQUITY</b>       |                   |
| <b>Liabilities</b>                  |                   |
| <b>Total Liabilities</b>            |                   |
| <b>Equity</b>                       |                   |
| Retained Earnings                   | 2,652.12          |
| Net Income                          | 2,392.05          |
| <b>Total Equity</b>                 | <b>5,044.17</b>   |
| <b>TOTAL LIABILITIES AND EQUITY</b> | <b>\$5,044.17</b> |



Southern Oregon Bookkeepers Association

www.SOBookkeepers.org

# Fraud Prevention Fair

Saturday, March 18, 2017, 12:00 - 4:00pm

Inn at the Commons, 200 N Riverside Ave, Medford, OR 97501

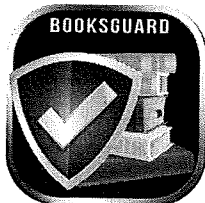
Pre-registration gets you swag at the door! <http://bit.ly/2mcLowl>

## FREE ADMISSION

March is Fraud Prevention Month! Talk to vendors and sponsors who advocate and take action for the **prevention** of fraud. Learn what you can do to protect yourself and what measures can be taken to prevent fraud all around you, every day, even online. Discover how businesses and technology companies work to guard your information. The SOBA Fraud Prevention Fair is a great place for networking and being present in your community. Enjoy some light refreshments while you learn from our showcase presenters over the course of the event, and start implementing better business practices and personal awareness immediately.



### THANKS TO OUR SPONSORS:



Post your comments on our Facebook page  
#soBookkeepers  
to be entered into a raffle-prize drawing.

Southern Oregon Bookkeepers Association  
1st annual

# FRAUD PREVENTION FAIR



For meeting information, "Join Our Mailing List" by  
visiting us on the web and completing the form:  
[www.soBookkeepers.org](http://www.soBookkeepers.org)

Also on facebook at:  
[www.facebook.com/soBookkeepers](https://www.facebook.com/soBookkeepers)

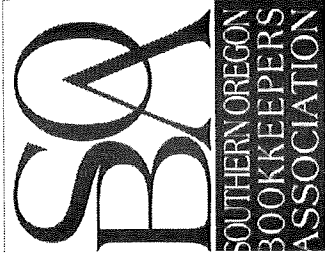
Sponsored By:



2017 Fraud Prevention Fair

[www.soBookkeepers.org](http://www.soBookkeepers.org)





*Southern Oregon Bookkeepers Association (SOBA) is a 501c3 non-profit professional organization dedicated to enhancing the education and networking resources of local bookkeepers and their clients.*

## Program Agenda

- 12 (Noon)** - Doors open “let the fair begin”
- 12:15 - 12:30** - Welcome Presentation: Introduction by SOBA President -Thank you!
- 12:30 - 1:00** - Speaker: Sgt Mak with City of Medford Police Department
- 1:00 - 1:30** Exposition and Prize Drawings
- 1:30 - 2:00** Speaker: Ingrid with Intuit Trainer Writer Network
- 2:00 - 2:30** Exposition and Prize Drawings
- 2:30 - 3:00** Speaker: TSheets
- 3:00 - 3:30** Exposition and Prize Drawings
- 3:30 - 4:00** SOBA Thank You. Closing Presentation. More prize drawings.

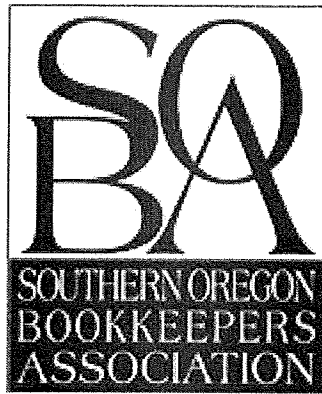
Use **#soBookkeepers** in your facebook posts over the course of the event, to be entered into a raffle-prize drawing.

### SOBA Upcoming Speaker Schedule (Monthly Meeting):

- April 12th - Joel Daniels with Aflac
- May 10th - Asana Demo (TBD)
- June 14th - ICB Certification Stories
- July 12th - Brian with YayPay (TBD)

Bookkeeping Members and Industry Partners attend to network and learn more about business and better business practices. You're invited to visit our monthly meeting. Please join us for networking, education and more! Visit our website [www.soBookkeepers.org](http://www.soBookkeepers.org) and check out our events calendar. Sign up for our monthly newsletter to stay up on the latest news from SOBA and hear important announcements from our Industry Partners as made available.

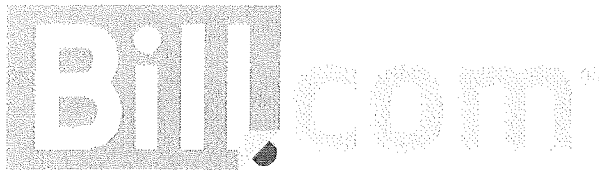
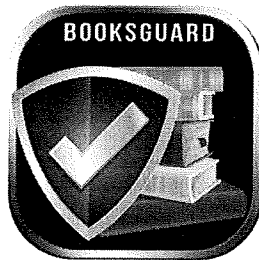
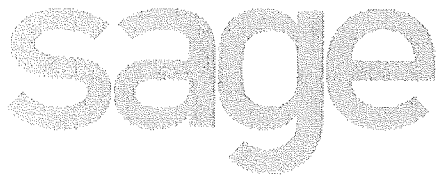
Additional Thanks To: Inn at the Commons, City of Medford Police Department, Medford Chamber of Commerce, LastPass, Grants Pass Chamber of Commerce, DP Certified Public Accountants LLP, Jeff Behrends and Cloudrine Woodcraft, LC, Vanessa Barrett (Polymath, LLC), David Mathieu (BBSI), Cathy Cardoza Cardoza Bookkeeping, LLC), Lauren Brastad (US Bank), and the following SOBA PF Event Committee of 2017: Ingrid Edstrom (Polymath, LLC), Steve Wilson (LegalShield), Audrey Isbell (AVA Virtual Assistance, LLC), Tracy Baird (TABulated Consulting, LLC), JoAnne Beck (Beck Bookkeeping, LLC)



Southern Oregon Bookkeepers Association - 1st Annual

# FRAUD PREVENTION FAIR

A few of our sponsors:



Open to the public, FREE to attend

## Saturday, March 18th! 12-4pm