

TAX-AIDE NEWS ' N' NOTES



Volume 8, Issue 4

November 2008

GREATER LOUISVILLE AREA TAX-AIDE

UGC site relocates to Altenheim

The site formerly located in the Urban Government Center (UGC) has moved to the **Altenheim**, located at 936 Barrett Ave. **Jerrye Davis** will be doing double duty as both the Local Coordinator (LC) and also as the Electronic Return Originator (ERO).

Fortunately, Tax-Aide is still able to have sites at the East, Central and Southwest Government Centers.

Hours at Altenheim will continue on Wednesdays from 10 am to 2 pm beginning in February.

ERO Change at CGC

Patricia Blewett is now the ERO for Central Government Center.

Sts Mary & Elizabeth Moves

Tax-Aide services will continue at **Sts. Mary & Elizabeth** but will now be located in an adjacent building at Plaza 1, located at 4402 Churchman Ave., to the left of the main hospital building.

Bill Ouzts will be the new LC and **Anne Bobigian** will continue as the ERO.

All other sites will continue in the same locations as last year with the possible exception of the temporary locations of the Special Sites division led by LC **Bob Pessolano**, who likewise does double duty as both LC and ERO.

Instructors Named

West District Coordinator (DC) **Al Eisert** has appointed the following as instructors for the paper filer classes:

Dan and Martha Dues, Carol Easley, Monty Gray, Jean Ledington, and Jim McKinney.

Dick Trowbridge, East DC & Sr TC, has named the following to lead the E-File classes:

Sarah Abraham, Eisert, John Emmerich, Bill Jasper, Bill Kugler, Bill Long, Bob Lukes, and Dave Nuermberger.

Both **Eisert** and **Trowbridge** will lead the Client Facilitator and Self-Study classes.

Class assignments will be mailed to all volunteers in December

Last New Volunteer Orientation Meeting- Nov 10

There is still time for new volunteers to learn about Tax-Aide this fall. The session will highlight typical activities for the various volunteer positions and sample materials will be distributed to those wishing to be a counselor.

The session will last about an hour and a half.

The meeting will be held at the KY AARP office on Linn Station Road in Suite 121 on Monday,

Nov 10 at 1:30 PM

Advance reservations are preferred to insure that adequate materials are available.

Individual interviews can also be arranged by appointment for those unavailable on the 10th.

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INVITE A FRIEND

Be sure to invite your friends and associates to join our crew of dedicated folks.

It's a great short-term job that only takes a few hours each week from Feb 1—Apr 15.

More information is available on the web at

www.aarp-tax-aide-lou.org.

IMPORTANT DATES

- Nov 3—Paper Instructors Meeting
- Nov 5-7—District Coordinators Annual Meeting
- Nov 10—New Volunteers Orientation
- Nov 14—Local & Shift Coordinator's Meeting
- Nov 27—Thanksgiving
- Dec 8-10 Instructor's Workshop
- Dec 16- ERO Meeting
- Dec 25—Christmas

The secret of a good sermon is to have a good beginning and a good ending; and to have the two as close together as possible. -- George Burns



Happy Holidays

*Caution is the Watchword***Adobe Acrobat Reader**

A TC from Florida has issued a caution about Adobe Acrobat Reader 9 pointing out you will no longer be able to save older .pdf forms once you have filled them in. Support has apparently been dropped for Reader extensions 5 and 6 which permit saving filled in forms.

You may want to hold up with 8 until a patch is made for 9.

Speaking of Words

Try these anagrams and see if you agree with some answers on page 4.

Dormitory
Presbyterian
Astronomer
Desperation
The Eyes

Are there others that you would suggest? Let us know via e-mail.

MS Operating Systems

Although Microsoft Windows XP with SP2 is our standard for this year, TaxWise has announced that the program will also run on Vista, which they will also support now.

Rumor suggests that Windows 7 is in the works as the next operating system so we will not switch to Vista until we learn more about version 7 and /or get improved hardware.

*Personal Tax Planning & Savings Ideas***ENERGY SAVINGS**

Some tips for saving energy related to your computer

- 1-Turn off your monitor if it is not being used for 20 minutes
- 2-Shut down your unit if not using it for 2 hours
- 3-Screen savers actually use more energy

ITEMIZING

Be sure to include your auto mileage for trips to the clinic, doctor's office and hospital.

Receipts for cash donations and cancelled checks are required; and larger gifts may require appraisals.

Detailed records are essential for proper credit.

RECENT DONORS

We're pleased to say thanks to **Don Eisert**, **Patrice Blanchard** and **Cheryl Martin** for their recent gifts.

Thanks too to **Cindy Cape** and **Roman Rusinek** who are working on some corporate gifts.

If Santa drops a new computer down your chimney, we could use the old one.

Watch the web site for December Updates

News 'N' Notes is generally not published in December. Instead, a letter is generally sent with information about your class time and location.

Class letters will go out around mid-month so watch both your e-mail and postal box.

Contact the office if yours does not arrive by Dec 20

IRS Study Materials

IRS study materials should arrive by Thanksgiving—they are supposed to be a little early this year.

Most volunteers review them prior to class and also pencil in the test answers since the test is due four days after class.

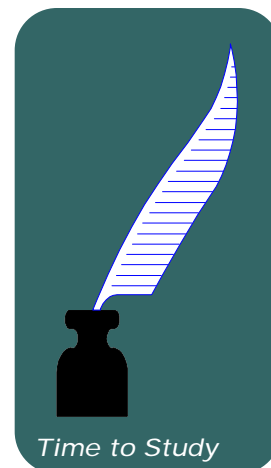
KY Study Materials

At press time, information was not available about the timing of the KY study materials. We are unable to mail the manual and forms so they may have to be distributed the first day of class.

Watch the web site for more information.

Tentative Schedule of January Classes

Jan 6-9	T-F	ERO's	KEY
Jan 7-8	W-Th	P-Sr	P= Paper class
Jan 10&17	Sat's	Self Study	E= E-File class
Jan 12-16	M-F	P-Beg	CF= Client Facilitator
Jan 12-13	M-T	E-Sr	
Jan 14-16	W-F	E-Beg	Practice for E-File is
Jan 19-20	M-T	E-Sr	available both before
Jan 19-23	M-F	P-Beg	and after class M-S
Jan 20-22	T-Th	E-Int	
Jan 21-22	W-Th	E-Sr	Most classes
Jan 30	F-am/pm	CF	meet 9am-4pm



Several Changes Anticipated in Tax Laws & TaxWise

With election just around the corner, numerous changes are anticipated in both houses of congress as well as the presidency.

A wide variety of changes are being mentioned by candidates, some of which may be implemented in time to affect the 2008 tax returns.

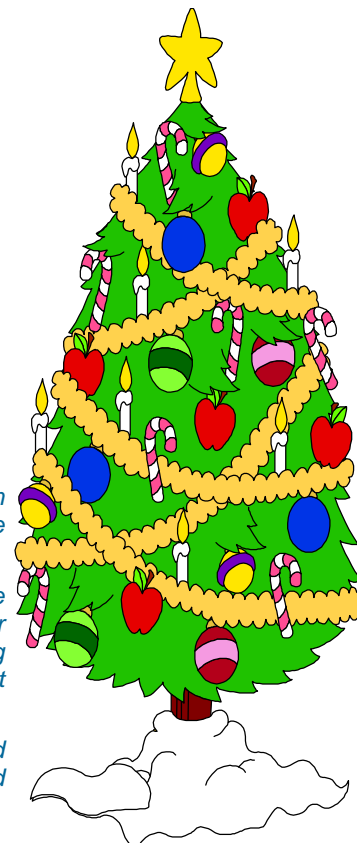
The 2008 TaxWise program will include several TW publications, several IRS publications (including Pub 17 and 3189),

the 2007 program, and also several third party program and utilities.

For security purposes, several changes are being made in the user names and passwords, both in complexity and in the rules for periodically changing passwords.

New updated encryption programs are also being installed, SecureDoc on the IRS units and TrueCrypt on the Tax-Aide units. Details will be covered on a "need to know" basis in the electronic classes.

"Tis the Season so Enjoy the Holidays



Some Comments from the District Coordinators.....

As we near the holidays and the beginning of a new year, we want to take this opportunity to say thanks for the many hours spent by all of our great volunteers.

In the rush to get things finished in time for the new tax season, we sometimes neglect saying how much it means to volunteer with others who are dedicated to providing a valuable service.

Your help is greatly appreciated, even when we forget to say thanks all the time.

Likewise, without the cooperation of the staff of Ky AARP and the use of their facilities on a regular and continuing basis, our Tax-Aide program would not exist. Many, many thanks!

*Finally, please accept our Thanks and our best wishes for the new year and the coming season. **AI & Dick***

**AARP TAX-AIDE**

10401 Linn Station Road
Suite 121
Louisville, KY 40223
Your Address Line 3

502-394-3443
LouTax-Aide@insightbb.com
www;aarp-tax-aide-lou.org

**Watch for
INTERIM
UPDATES &
NEWS REPORTS
AT**

www.aarp-tax-aide-lou.org

*(We're not anticipating a Dec
issue of News'n'Notes)*

News'N'Notes is intended primarily for volunteers of the Louisville Area AARP Tax-Aide Program. Generally issued monthly from August through April and is also available on the web site under the "News" tab at www.aarp-tax-aide-lou.org.

District Coordinators Al Eisert and Dick Trowbridge

How'd You Do

on the Anagrams?

There are always lots of answers but here are the ones suggested with this series.

Dirty Room

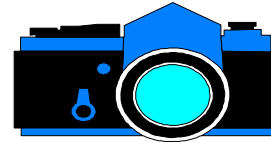
Best In Prayer

Moon Starer

A Rope Ends It

They See

If you enjoy puzzles, try one of the new crossword puzzles that features some of the terms and phrases used in TaxWise.

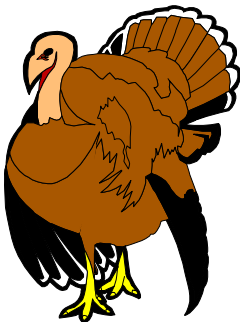


Pictures? Photos?

If you have a digital camera and enjoy taking pictures, check with the editor about shooting some shots for Tax-Aide.

We would like to get some shots at some of the meetings, some head shots of leaders, news shots of the awards presentations and services provided at the sites.

Gobble, Gobble



**Happy
Thanksgiving**

Instructors Help with State Workshop

Our local instructors will be attending a state-wide Instructor's Workshop for three days in December at Rough River State Park.

Three elements are planned for the event. The opening morning session will feature an introduction for those that have not attended the workshop either of the last two years, the main program will then continue until lunch of the third day, and finally the afternoon of the third day will involve a special section for Technology Coordinators.

One evening will have an optional specialty session and the other evening will be devoted to individual team meetings for

each district. Our teams will be finalizing plans for our classes.

Several of the local instructors will be leading sessions at the event. **Bob Lukes** will present the Ky test that was designed by **Bill Jasper** with assistance from **Bob** and **Monty Gray**.

Jean Ledington will provide input on three of the new and redesigned federal forms.

Bill Risley, the state Tax-aide Training Specialist, will be in charge of the workshop, which will be duplicated at Blue Licks for the eastern districts.

Several other Louisville instructors are expected to lead some of the sessions too.