

# TAX-AIDE NEWS ' N' NOTES



Volume 8, Issue 3

October 2008

## GREATER LOUISVILLE AREA TAX-AIDE

### *Webster & Tretter To Lead Iroquois— Instructors Begin Plans*

The Iroquois Library Site will now be led by **Cynthia Webster** as Local Coordinator and **Jim Tretter** as Electronic Return Originator. Both have worked at the site previously and agreed to step forward into leadership roles.

**Al Eisert** will assume the Technology Coordinator role relating to the Louisville Free Public Library for both Iroquois and the Portland Library site.

Both the Downtown and Westport libraries have also been used as Tax-Aide sites in prior years. Libraries serve as the primary sites in Southern Indiana.

Illness will prohibit **Bill Jasper** from continuing in those roles.

#### **INSTRUCTORS PLAN CLASSES**

Initial plans for the 2008 tax year classes will feature a schedule and classes similar to last year.

All classes will be held in January and will feature sessions for

Paper Preparers

Electronic E-File Preparers

Electronic Return Originators'

Client Facilitators

Self Study

Tutoring & Practice

The Paper preparer classes will meet in community facilities and the remaining classes will meet at the KY AARP office.

### **Delores Wathen New SC**

Regional Coordinator **Don Smith** has selected **Delores Wathen** as the KY State Coordinator to succeed **Elmer Olson** who resigned unexpectedly due to family health problems

Delores is well known in Louisville and across the state. She started with Tax-Aide in 1987 as a counselor, served as an LC, spent eleven years as a DC and has been the State Administrative Specialist since 2001.

She has continued to help at several sites in Louisville throughout her TA career and has willingly assisted whenever asked and needed.

#### **Congratulations Delores!**

### *Two Choices For New Volunteer Orientation Meetings*

Two options are still available for new volunteers to learn about Tax-Aide this fall. Each session will highlight typical activities for the various volunteer positions and sample materials will be distributed to those wishing to be

a counselor.

The sessions will last about an hour and a half so potential volunteers can select the one that best fits their schedule.

Options are:

- Oct 24 Fri 10:00 AM
- Nov 10 Mon 1:30 PM

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

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#### **HELP NEEDED**

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](http://www.aarp-tax-aide-lou.org).

**IMPORTANT DATES**

- Oct 10—Site data due
- Oct 17— Fri, 9:30 am  
New LC,SC  
Orientation
- Oct 17—Fri, 1:30 pm  
New ERO  
Orientation
- Oct 24— Fri, 10:00 am  
New Volunteer  
Orientation
- Oct 29— Wed, 1:30 pm  
New E-Filer  
Orientation
- Oct 31-Fri, 9:15 am  
E-Instructor's  
Meeting

*Be careful about  
reading health  
books.. You may  
die of a misprint. --  
Mark Twain*

*October is Orientation Month*

Orientation and information meetings are the theme for October.

**New Local Coordinators and Shift Coordinators** will meet on the 17th to prepare for their role in supervising the work at the sites. Several new procedures will be used for the 2008 tax year.

**New ERO's** will gather on the afternoon of the 17th for a similar session related to their role in trans-

mitting electronic returns and the numerous functions expected from ERO's.

A morning session is being held the 24th for **new volunteers** who find an am meeting more convenient. Plenty of space will be available for men and women interested in helping with the AARP Tax-Aide program. Offer to bring a friend or acquaintance to the meeting.

Special invitations will be extended to those who have indicated an interest in **becoming an e-filer** after receiving a strong foundation in tax law and having had experience in preparing returns. The meeting is set for Oct. 29.

**E-Instructors** will gather on the 31st to begin detailed plans for the January classes. Several changes are expected in the TaxWise software for 2008.

*Personal Tax Planning -***FREE CREDIT REPORTS**

It is always a good idea to check your credit report regularly. information is sometimes out of date or posted in error. You are entitled to a free copy from each of the three major credit bureau's once each year. For more information, see [www.annualcreditreport.com](http://www.annualcreditreport.com). Protect your identity from fraud.

**Donations Sometimes Help if you Itemize**

With the holidays just around the corner, charities will be increasing their pleas for help and contributions.

Remember to get a receipt that recognizes and itemizes your donation—and be sure to write a check—cash does not leave an audit trail.

**Recent Tax-Aide****Donors**

IRS, KY AARP, Dick & Murt Trowbridge, Anonymous via Ronnie Gordon, Bob Lukes, and Donald Eisert via Al Eisert .

Thanks to each for their kindness and generosity. Remember, many firms will match employee contributions—does yours?

*Web site keeps Volunteers Up to Date*

As more and more people gain access to the web, it continues to grow and become a vehicle of news and information. Unfortunately, all of the information is not necessarily true and the news can be quickly biased by the writers views.

The Louisville AARP Tax-Aide site is intended pri-

marily for our volunteers, as is this newsletter, but both are available to the general public.

Two sections of the web site are password protected and available only to either all current volunteers or to our LC's and ERO's. Using these, we can quickly communicate with our volunteers.

Most of the web site is designed for the use of the general public.

Since 92% of our volunteers have e-mail, our ability to communicate is vastly improved since messages can be broadcast quickly and read at the leisure of the recipient. **Do we have your current e-mail address?**

## Earned Income Tax Rules Changing for Tax Year 2008

Earned income and adjusted gross income (AGI) must each be less than: \$38,646 (\$41,646 married filing jointly) with two or more qualifying children;

- \$33,995 (\$36,995 married filing jointly) with one qualifying child;  
\$12,880 (\$15,880 married filing jointly) with no qualifying children.

Tax Year 2008 maximum credit:

- \$4,824 with two or more qualifying children;
- \$2,917 with one qualifying child;  
\$438 with no qualifying children.

Investment income must be \$2,950 or less for the year.

The maximum Advance Earned Income Tax Credit (advance EITC) for TY 2008 the employer is allowed to provide with the employee's pay is \$1,750.

Always check  
the IRS web site  
[www.irs.gov](http://www.irs.gov)  
For the latest  
information

## Technology Coordinators Support Sites & Fix Equipment

With literally hundreds of computers, printers, copiers and other ancillary equipment, we depend upon our Technology Coordinators (TC's) to keep us running.

This group of six volunteers, led by Senior TC **Dick Trowbridge** works around the clock and almost around the year. They usually get some time off during the summer but are already getting things ready for the tax season.

**Larry Curtis** is the primary man for hardware and operating systems and **Al Eisert** maintains the collaboration with the Louisville Free Public Library.

All three pitch in with **John Emerich, Bill Long and Bob Lukes** to get the computers set up and ready with new software and support elements for tax year 2008. All computers were recalled for updating and routine maintenance at the end of last season.

Each TC also provides backup sup-

port for several sites during the tax season. In their spare time, they also help instruct the e-filing classes and serve as ERO's.

### PRINTER TECH NEEDED

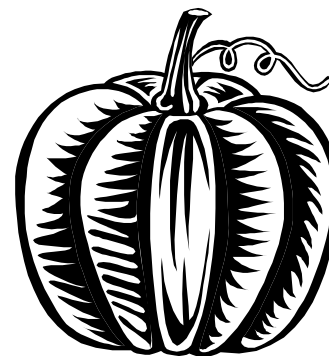
A volunteer skilled printer technician is needed to help repair printers. Typical brands include Brother, HP, Lexmark and other laser printers. Call Dick at 502-394-3443 if you have printer tech skills and are willing to help in this role.

### TV Converter Boxes

If you get your TV reception over the air, you may need a digital conversion box beginning Feb 17.

\$40 coupons are available (limit two per household). Contact [www.dtv.gov.com](http://www.dtv.gov.com) for more information and to sign up for coupons. Net cost per box is about \$20.

*We could certainly slow the aging process down if it had to work its way through Congress. -- Will Rogers*





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

**[www.aarp-tax-aide-lou.org](http://www.aarp-tax-aide-lou.org)**  
**(Usually posted twice a month)**

**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](http://www.aarp-tax-aide-lou.org).  
**District Coordinators Al Eisert and Dick Trowbridge**

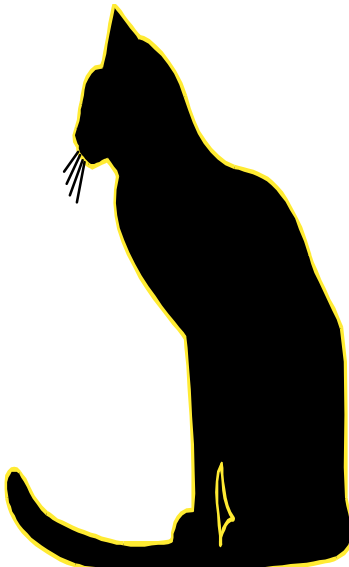
**Electronic Return Originators  
(ERO's)**

CGC Chuck Blattner  
CLIFTON Dick Trowbridge  
EGC Bill Kugler  
HILLVIEW Marty Tittlebaum  
IROQUOIS Jim Tretter  
JTOWN Bill Long  
LYNDON Roger Crum  
MT WASH Mary Thompson  
OLDHAM Dave Nuermberger  
PORTLAND Judith McCandless  
SALEM Bob Lukes  
SHELBY Marvin Rogers

SPEC SITES Bob Pessolano  
ST MATT John Emmerich  
STS M&E Anne Bobigian  
SWGC Martha & Dan Dues  
UGC Jerrye Davis

Serving as an ERO is the busiest job of all during the tax season and takes many additional hours each week. Each of the above has demonstrated their commitment and skill in a variety of other positions too.

**Thank You  
For Your Extra Effort!  
Well Done!!**



**Happy  
Halloween**

***Economic Stimulus Payments Still Possible in 2008***

Persons eligible for the Economic Stimulus Payments who wish to receive their funds in 2008 must file by October 15.

A vast majority have already filed via their regular tax returns or the special return for this purpose and have already received their funds.

Political candidates have made reference to possible additional stimulus type payments but nothing is official and rumors are expected to abound as the campaigns continue.

To be eligible, you must have a total of \$3,000 or more in qualifying income and file a 2007 tax return.

Qualifying income is.....

Earned income,

Social Security benefits ( including social security disability payments)

Certain railroad retirement benefits

Certain veterans' benefits

Nontaxable combat pay

Payments range up to \$300 for adults and additional payments of up to \$300 for each qualifying child.

Complete details are at [www.irs.gov](http://www.irs.gov).