

TAX-AIDE NEWS ' N' NOTES



Volume 9, Issue 7

February 2010

GREATER LOUISVILLE AREA TAX-AIDE

32 VOLUNTEERS RECEIVE MULTI YEAR PINS

Thirty Two volunteers received their 5 year increment pins for their volunteer service.

Ed Hennekes and Jim Miller reached the 15 year mark at their classes in January. Jim is the LC at Salem, the largest site in KY doing almost 2000 federal returns. Ed is a senior counselor at Lyndon, our second largest site.

Julia Carey, Carol Easley, Al Eisert, Bill Kugler and Gerry Snyder tallied up 10 years with the 2009 tax season being completed in 2010.

Three others received recognition for their over 25 years of service. **Ethel Webster** reaches

29, **Alice Hannah** for 27 and **Dick Trowbridge** at 26 years

Reaching the Five Year Mark

Twenty-five will make their 5th year with the current season.

Pat Blewett

Gerald Dudgeon

Dan & Martha Dues

Melvin Greer

Linda Horton

Bruce Lawler

Donna Luckett

Jim McKinney

Betty Miller

Jim Morrill

Donna Peak

Allie Phillips

Don Pickerill

Wolf Pressburger

AW Rosenthal

Wayne Rudloff

Carol Somplasty-Jarman

Marty Tittlebaum

Jim Tretter

Frances Van Arsdale

Lawrence Volwels

Iris White

Charles Will

INSERT FEATURES SITE LOCATIONS & HOURS

A special two-sided insert features the site locations and hours for various site groupings.

The **Louisville Districts** include service to Jefferson, Bullitt, Spencer, Shelby, Henry and Oldham counties.

Special Sites generally provide single or multiple visits to temporary locations. These are generally intended for the residents and surrounding neighborhoods. Shut-ins are helped by the nearest facility in their neighborhood.

Southern Indiana sites are listed by community and include areas from the Ohio River and north to Salem and Henryville.

Most sites operate on a first come-first served basis. The exception is Shelbyville which offers limited reservations. Since the time needed for a return varies dramatically, it is generally not practical to reserve time.

A free service is also available to locate sites throughout KY and IN and across the United States. The web site is www.aarp.org/taxaide.

Local offices of the IRS and KY Dept of Revenue will also assist tax payers in downtown Louisville as well as VITA sites.

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Longer Hours

The new trend is to have fewer sites but to keep them open multiple days that enables more efficient use of the equipment.

Thanks To Our Instructors

We would be remiss not to say a special **Thanks** to our dedicated and tireless instructors.

They began preparing in August and have continued to prepare with a series of training and discussion meetings. They also took three days away from their families to attend and host the Western KY workshop for Tax-Aide instructors. In early December. Their spouses

were accused of shopping during the workshop. (Sure hope Santa was nice to all!)

Jim McKinney was the lead instructor for the paper classes along with **Carol Easley, Dan and Martha Dues.** DC **Al Eisert** coordinated the classes.

Classes were held at the Buchel Fire Department and the Salem United Christian Church. The

church is also the largest Tax-Aide site in KY.

E-Classes were led by **Sarah Abraham, John Emmerich, Al Eisert, Bill Kugler, Bob Lukes and Dave Nuernberger.**

Assisting were **Roger Crum, Bob Pessolano, Marvin Rogers, Mary Thompson and Cynthia Webster.** The Eclasses were held at the KY AARP offices as are most of our events.

Planning for your personal return?

Volunteering to help others can lower your risk for depression and heart disease, raise your self esteem and happiness and extend your life!

Keep Volunteering, it's life saving.

It may seem strange, but now is the time to begin planning for your 2010 tax program.

If you are still employed, be sure to adjust your withholding so it will be in line with your gross income.

Do you make estimated payments? Review the amounts needed and remember to make your payments by April 15,

June 15 and September 15 as well as Jan 15 2011.

If investing, this may be the time to reinvest in some of good instruments that you sold near year end to structure your capital gains and losses.

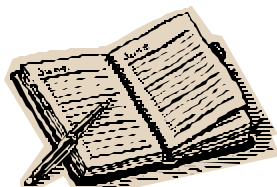
Consult with your financial advisor and plan to invest on a regular basis. Very few people are able to time the market so

regular purchases typically are better for most of us.

As we grow older, our investment objectives change so it may also be a good time to review your portfolio if you haven't done so recently. Your broker or advisor will be pleased to work with you.

In any case, Good Luck for a super year in 2010. It will be an interesting

Meet our New Counselors



Check the website for last minute changes and updates.

Welcome to these new counselors expected to pass their tests.

Robert Brown
Kirsten Calfo
Constance DeWeese
Jim Grissom
Carl Heger
Tony Jenne

Ronald Justice
Phani Kambhampati
Nyo Killian
Xavier Klinefelter
Ed Miller
Jim Morris
David Perry
Betty Probst

Stephan Samuels
Michael Stevens
Doris Weddle

Hope each of you have a good experience in providing this important service to the community.

Thanks for volunteering your time and talent and welcome aboard!

Introducing the new Client Facilitators

We're pleased to welcome a number of new volunteers who registered for the Client Facilitator class.

They will be among the first to welcome clients when they come to our sites. In addition, they will perform the usual duties assigned in getting the intake form completed and helping

organize the clients records.

The following were registered:

Lucile Barnet

Annie Browne

Nyo Killian

Mary LaDuke

Dennis LaFollett

Linda Lee

Wilma Philpott

Susie Robinson

Jerry Veltman

Welcome to the special world of AARP Foundation Tax-Aide Volunteers, there are over 33,000 of us helping others at over 6,000 sites.

Time to
begin the
2009 Tax
Returns

National Taxpayer Advocate Addresses Congress

National Taxpayer Advocate Nina Olson released her annual report to Congress recently. It warned that additional demands on the IRS are weakening its' ability to properly service taxpayer needs and is expressing concern that IRS collection practices are harming financially struggling taxpayers without producing significant revenue gains.

Phone Service—The average wait time is expected to be 12 minutes and the number of completed calls is dropping from

83% down to 71%. Olson wrote that this level of service is not acceptable.

The report went on to deal with a variety of issues from refunds to policies and other activities related to the agency

In other news, concerns have been expressed about the following:

Face to Face service—Fewer and fewer taxpayers are able to obtain service at the various local IRS offices. Budgets have been reduced causing hours to be reduced, evening service discontin-

ued and Saturday service abolished.

One of the coming activities will involve closer control and monitoring of preparers that may not have appropriate credentials to prepare and represent the interests of taxpayers.

Further details can be found in news releases issued by the IRS publications and via the IRS Newswire. See also the web site www.irs.gov.

Celebrating Our Birthdays

February Birthdays

1— Bruce Lawler

Bernice Pratt

4— LaVerne Gagel

11— Sandra Frazier

Bill Kugler

14— Bob Pessolano

18— Linda Hulsey

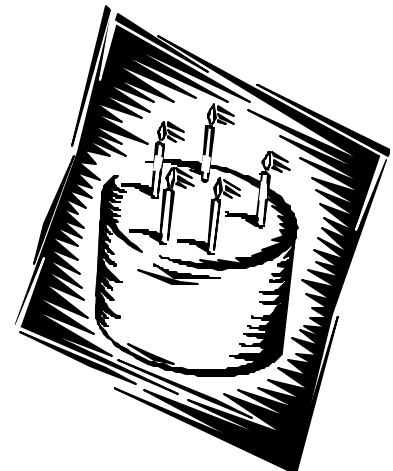
19— Rita Morrow

Nellus Wilson

30— Ethel Webster

Missed your name? Let us know!

**Congratulations &
Happy Birthday**





AARP TAX-AIDE
10401 Linn Station Road
Suite 121
Louisville, KY 40223

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

Headlines Elsewhere

*Change is Good,
Except if it isn't*

How's that?

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 "Newsletters" tab at www.aarp-tax-aide-lou.org.
District Coordinators Al Eisert and Dick Trowbridge

WHAT A PLEASANT VOICE AT 394-3443

With more and more businesses and institutions going high tech, it's a delight to talk to a real person.

Our Tax-Aide phone will still have an answering machine for off hours but we now have several folks that will cover the office on a regular basis from 9:15-3:00 on weekdays.

New office volunteers **Lynn Cotton, Jim Hannah, Chris Newcomb, Michelle Shogren, Lee Smith and Talberta Yowell** will offer a pleasant and friendly greeting. In addition, they will be

helping with other chores to help support the various sites around the area.

Hundreds of calls come during the tax season and now most of them will receive a live and cheerful response.

The service will begin the last week in January and continue through April 15.

If you would like to help, we still need backup persons to fill in on both a permanent and on-call basis.

Call now if you are available and interested.

This'n'That as seen in News'N'Notes

SNO-DAZ

Forecasters are predicting a harder winter and more snow this winter. At least that's what the signs say according to folk meteorologists watching the squirrels, woolly worms, etc.

Since they've been known to be accurate more times than not, we need to remind folks of our snow policy.

We follow the school district in which the site is located. If school is closed, so are we. If school is delayed, we will open at our regular time.

Most sites have a phone chain to verify plans for any day in question. Happy Sno-Daz.

With **Bill Long's** continued illness, **Sarah Abraham** will be serving as the LC and ERO at Jtown. Bill had problems late in the season last spring and has had extensive treatment with Chemo and Radiation and numerous other procedures.

Also on the sick list is **Jim Tretter**. **Carol Easely** will fill in as the LC at Hillview and **Al Eisert** will be ERO.

Tax-Aide volunteers do not offer tax advice—that should be done by professionals in the field. We do prepare returns and depend upon the taxpayer to provide all necessary information. The taxpayer is ultimately responsible for their own return.

During December and January, all of our TC's spent numerous hours getting the equipment ready for the new season. Thanks to each for "above and beyond" service to Tax-Aide.



HAPPY VALENTINE'S DAY