

TAX-AIDE NEWS ' N' NOTES



Volume 9, Issue 6

January 2010

GREATER LOUISVILLE AREA TAX-AIDE

HAPPY NEW YEAR

Mt Washington and Salem win Q Award

Two sites were visited during the tax season last year and both received the IRS "Q" award for quality.

The award was presented by **Maylyn Carby**, IRS SPEC at the fall District Coordinators meeting. It was then passed on in turn to **Mary Thompson**, LC for Mt Washington and **Wayne Rudloff**, Shift Coordinator representing **Jim Miller**, LC for Salem.

The award was made in recognition of the sites meeting the highest standards for quality in preparing tax returns. Congratulations!

IRS Grants over \$500,000 to AARP Foundation for Tax-Aide

The AARP Foundation was the recent recipient of \$551,250 from the IRS to help fund the AARP Tax-Aide program. Some 360 organizations received grants ranging from \$3,725 to the high of \$551,250 given to Tax-Aide.

The grants were made to help fund the VITA (Volunteers In Tax Assistance) and TCE (Tax Counseling for the Elderly) programs which together have about 12,000 locations and completed 3,000,000 returns. Tax-Aide is the largest TCE provider and did 2,000,000 returns at 6,500 sites last season.

VITA sites are limited to clients with a maximum adjusted gross income of \$49,000. Many use the 1040EZ and 1040A forms while Tax-Aide uses only the 1040 which can be filed with any AGI.

Tax-Aide volunteers are all certified at the advanced level which enables them to do a broad range of tax returns. The Louisville Districts have seventeen regular sites and also serve an additional 12-14 temporary sites throughout the community.

There are 12 districts in KY providing service at over 90 sites.

Emmerich's in Volunteer Spotlight

John and Connie Emmerich were featured in the **AARP Kentucky Volunteer News** in December. The publication features a different volunteer each month.

John began volunteering with Tax-Aide about ten years ago

and Connie started about three years later.

Both help at the St Matthews site where Connie is the CF and John is both the LC and ERO. In addition, John works year-round as a TC and instructs the

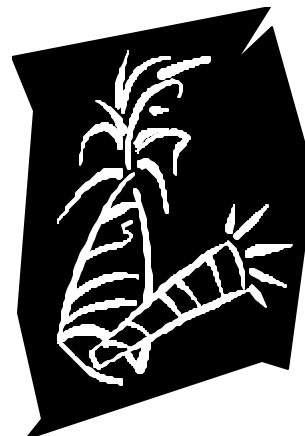
e-classes.

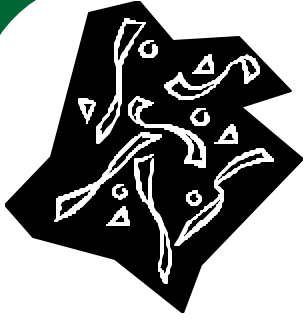
John can also be found at various sites when they are short handed or need technical assistance.

Sailing is a favorite pastime for both during the summer.

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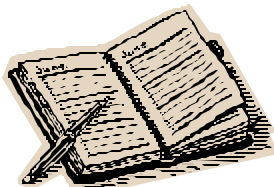




Fewer Sites

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

Maybe it's true that life begins at fifty, but everything else starts to wear out, fall out, or spread out. - - -



Check the website for last minute changes and updates.

IRS Seeks to Return \$123.5 Million in Undeliverable Refunds to Taxpayers

WASHINGTON — The Internal Revenue Service is looking for taxpayers who are due to receive a combined \$123.5 million in the form of 107,831 refund checks that were returned to the IRS by the U.S. Postal Service due to mailing address errors.

“We are eager to get this money into the hands of taxpayers, so don’t delay if you think you are missing a refund,” said IRS

Commissioner Doug Shulman. “The sooner you update your address information, the quicker you can get your refund.”

All a taxpayer has to do is update his or her address once. The IRS will then send out all checks due. Undeliverable refund checks average \$1,148 this year, compared to \$990 last year. Some taxpayers are due more than one check.

Average undeliverable refunds rose by 16 percent this year, which is in line with the 16 percent rise in average refunds for all tax returns in the latest filing season.

The vast majority of checks mailed out by the IRS each year reach their rightful owner. Only a very small percent are returned by the U.S. Postal Service as undeliverable.

Planning for your personal return?

Most brokers provide a booklet that identifies the portion of earnings that may be exempt from KY taxes. Be sure to ask if it does not arrive in a timely manner.

Many people often sell selected items in December as they plan to deal with capital gains and losses. Remember the ruling related to replacing items sold with substan-

tially the same holding. Consult with your financial advisor before making purchases during the first 30 days or so of the new year.

Santa Visits Tax-Aide

We were pleased that Santa arrived in the person of **Larry and Mike Curtis, John Emmerich, Dave Nuermberger, Mary**

Thompson and Dick Trowbridge.

It seems that each had a bag of goodies to support the program—even a laptop among other things.

Many thanks to each of those named as well as many others during 2009—our program is growing every year.

When are the classes?

ERO's—Jan 7,8,11,12

Paper Sr—Jan 11-12

Paper New—Jan 13-19

E Int—Jan 12-14

E New—Jan 13-15

SS—Jan 16 & 23

E Sr1—Jan 18-19

E Sr2—Jan 20-21

E Sr3—Jan 22,25

E Sr4—Jan 26-27

CF New—Jan 27

CF Sr—Jan 29 am or pm

Screeners—with CF Sr

M a k e - U p — J a n
9,16,23,30

Equip Pickup—Jan
28&29

Classes generally run from 9:00 am to 4:00 pm.

Mid-morning and mid-afternoon breaks help and lunch generally runs 45-60 minutes.

CF and Screener classes have shorter hours—usually about 2 1/2 hours, beginning at 9:30 and 1:30.

Planning Ahead

Over 50 % of the returns we handle are completed in February. In light of this, several sites add an extra day each week in February to help handle the additional volume.

Several sites need extra help in February and all volunteers are encouraged to sign up for extra sessions if they have time.

Likewise, the **Special Sites** group needs extra help in March and early April. This service is offered at a variety of sites around Jefferson County and usually needs help on Thursday, Friday and particularly on Saturdays.

Here again, you are urged to sign up when the sheet is passed around in class in January.

The detailed schedule for Special Sites will be posted in class for you to select the times that you could help.

These temporary sites include the Downtown Library, Goodwill, and several assisted living centers and nursing homes.

Thanks for making this extra effort to serve others that need your help.



IRS Announces 2010 Standard Mileage Rates

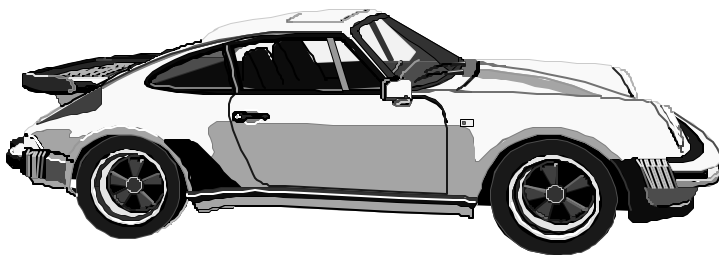
.WASHINGTON — The Internal Revenue Service issued the 2010 optional standard mileage rates used to calculate the deductible costs of operating an automobile for business, charitable, medical or moving purposes.

Beginning on Jan. 1, 2010, the standard mileage rates for the use of a car (also vans, pickups or panel trucks) will be:

- 50 cents per mile for business miles driven

- 16.5 cents per mile driven for medical or moving purposes
- 14 cents per mile driven in service of charitable organizations

The new rates for business, medical and moving purposes are slightly lower than last year's. The mileage rates for 2010 reflect generally lower transportation costs compared to a year ago.



Celebrating Our Birthdays

January Birthdays

1- Bruce Lawler

Bernice Pratt

4- LaVerne Gagel

10- Mary Kleinhelter

11- Sandra Frazier

Bill Kugler

14-Bob Pessolano

18- Linda Hulsey

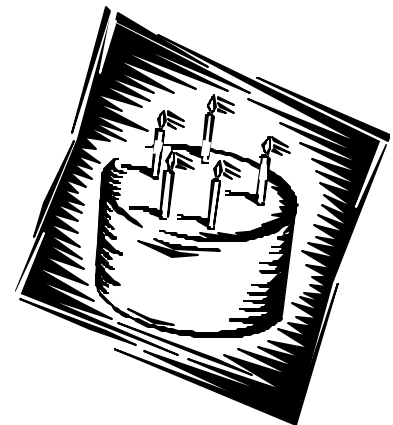
19- Rita Morrow

Nellus Wilson

30-Ethel Webster

Missed your name? Let us know!

**Congratulations &
Happy Birthday**



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Headlines Elsewhere

Typhoon Rips Through Cemetery; Hundreds Dead

Did I read that right?

Man Struck By Lightning: Faces Battery Charge

He probably IS the battery charge!

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

Flash Drive Problems?

"Have you run into the old 'USB Device Not Recognized' ? 'Replace the device' is usually the recommendation of the troubleshooting process. Another suggestion is often to replace the cable – and both seem to work but here's another thought.

It's not just cables, USB flash drives are also prone to this kind of failure. It comes from the mechanical flexing of the plug, which can crack the soldered electrical connections inside the cable or USB device. Depending on how

the device or cable is inserted into the socket, the cracked connections may or may not make contact which is why this can appear as an intermittent problem.

Once the solder connections are broken, there's no practical way to fix them. Your best bet is to prevent the problem from the start. Whenever you plug in any USB hardware — including cables — make sure you grip the device solidly where it's meant to be gripped. Insert and remove the device perpendicularly to the plug,

FIRST TIME HOME BUYERS

On November 6, the President signed the *Worker, Homeownership and Business Assistance Act of 2009*.

This act expands the First-Time Homebuyer Credit.

See the article on www.irs.gov for more information.

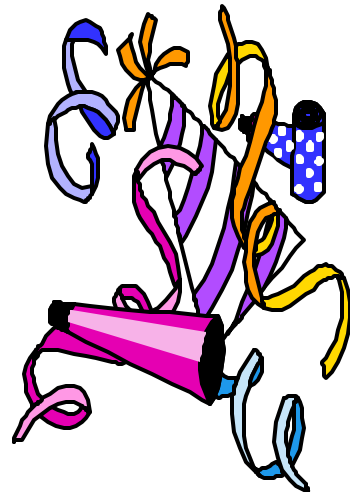
It is important to note that, according to [IR-2009-108](http://www.irs.gov), "Taxpayers who claim the credit on their 2009 tax return will not be able to file electronically but instead will need to file a paper return."

This'n'That as seen in News'N'Notes**SNO-DAZS**

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 (sometimes), we've built in a couple of snow days in January for makeup classes. Snow or bad weather is forecast for Jan 11, 12, 14, 21 and 31. Sure hope they are wrong!

Our make-up days are Jan 9, 16, 23 & 30. Otherwise, these can be scheduled for practice if you need more time on the machines.



Welcome to the New Year