

# TAX-AIDE NEWS ' N' NOTES



Volume 9, Issue 4

November 2009

## GREATER LOUISVILLE AREA TAX-AIDE

### Getting Ready For Counselor's Class

It's been several years for most of us since we went to "school".

With all the changes for 2009, **it is imperative that we prepare very carefully before we attend class in January.** Here are a few hints for your consideration:

Begin to study as soon as the materials arrive. Remove sections that do not apply – specifically those related to **Military** and **International** issues.

Limit yourself to a reasonable amount of time each day – maybe just an hour or two. Use Pub 17 (may be late Dec) for additional details on items needing more explanation.

Read the entire study book and

do **all** the exercises, answer the questions and verify your answers.

Prepare the test with pencil so you can review it and make any changes needed.

Make notes of questions you want to bring up in class. All of the above should be completed prior to attending class in January.

Material from the IRS should arrive prior to Thanksgiving – Ky materials are expected to be available on the web site prior to distribution at class.

**Client Facilitators and Screeners** will receive their materials at class in January.

#### PBT Power Point slides

##### now available

The new PBT (Process Based Training) power point presentations are now available on the Extranet site – see [www.aarp.org/sk/taxaide/](http://www.aarp.org/sk/taxaide/).

Select the "Training" tab and then **PBT Slides (9/09)** in the right hand column. There are about 35 presentations listed covering most of the materials in the study books. The file needs to be unzipped and most Windows systems do this automatically. It may be necessary to save the folder to your hard drive before unzipping.

Some of the presentations will be used in the classes and you may find them helpful as you brush up on selected topics in your preparation for the new season.

### One More Time for Information/Orientation

Be sure to invite your friends and associates to volunteer for Tax-Aide.

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 site and interested persons can also register there, or by phone or e-mail.

**Nov 10 Tues 1:30 PM**

Last call for the 2009 season!

#### Study Materials are "in the mail"

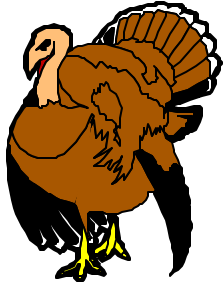


Well, actually they will be delivered by UPS so be sure you have a valid shipping address for assured delivery.

Packets are expected to arrive near Thanksgiving. If they haven't arrived by early December, call (502) 394-3443 to make arrangements to pick up materials at the AARP Tax-Aide office.

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### Happy Thanksgiving !

AARP Tax-Aide has over 33,000 volunteers serving at some 6,500 sites across the United States. It is the largest volunteer tax service in the USA.

## What's in my training kit?

### Publication 1491

#### Student Training Guide

This is the primary text that needs to be thoroughly read and all exercises completed before class

### Publication 4491-W,

#### Comprehensive Problems & Exercises Workbook

Problem and practice exercises that cover changes in the tax law.

### Publication 4012,

#### Volunteer

#### Resource Guide

A handy resource guide for both paper and electronic 1040 returns that begins with the new Intake form and then completes the return. A must for every aspect of preparing returns (along with Pub 17), be sure to have both available when dealing with any aspect of tax law and the respective forms.

### Form 6744, Test

The open book test and standards of conduct form.

A grade of 80% each is required at the first three levels, beginning, intermediate and advanced to become certified. (Likewise for the KY test for all and the additional proficiency test for e-filing)

**Remember to ignore the military and international sections in all materials.**

## Planning for your personal return?

The cardiologist's diet:

If it tastes good, spit it out.

New furnace, new windows, new water heater and a variety of other energy saving items will provide a nice credit of up to \$1,500. But remember, this is the maximum, regardless of the amount spent.

The general rule allows 30% of the cost, up to a gross maximum of \$1,500, not to each individual unit. Since the

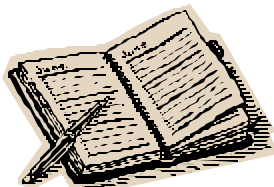
credit will continue into 2010, you may want to hold off on some of the purchases until after the first of the year—particularly if you are at or near the \$1,500 maximum already.

### HOMEBUYERS

Taxpayers who didn't own a principal residence during the past three years and purchase a home this year before Dec. 1

can receive a credit of up to \$8,000 on either an original or amended 2008 tax return, or a 2009 return. But the purchase must close before Dec. 1, 2009, and an eligible taxpayer cannot claim the credit until after the closing date. This credit phases out at higher income levels, and different rules apply to home purchases made in 2008.

## When are the classes?



Check the website for last minute changes and updates.

The complete schedule will be ready by December but generally anticipated dates are as follows: **(ALL subject to change)**

ERO's—Jan 7-12

Paper Sr—Jan 11-12

Paper New— Jan 13-19 and/or Jan 20-26

E Int—Jan 12-14

E New—Jan 13-15

SS—Jan 16 & 23

E Sr—Jan 18-27

CF—Jan 27—29

Screeners—Jan 27-29

M a k e - U P — J a n 9,16,23,30

Equip Pickup—Jan 28&29

Assignments will be e-mailed in December after dates and locations are finalized.

In general, classes are grouped by zip code to enable car pooling.

All classes have limited seating.

## Planning Ahead

### November

2- 10:00  
Paper  
Instruc-  
tors  
Meeting



3- 1:30 New E-Filer  
Orientation Session

10 - 9:30 Local & Shift-  
Coordinators Meeting

10 - 1:30 New Volun-  
teer Information/  
Orientation

### December

1-3 & 7-9 Instructor  
Training Workshops

3 - 1:00 Technology Co-  
ordinator Training with  
**Carl  
Bush,  
TCS**

16 -  
9:30  
ERO  
Training  
and  
Work-  
shop



### Instructor's Training

Two three-day work-  
shops are slated for KY  
Tax-Aide instructors.

Western state instructors  
will meet at the KY AARP  
office Dec 1-3

Eastern teachers will  
meet at Blue Licks State  
Park Dec 7-9.

**Susan Buffin** is the Tax-  
Aide Training Specialist  
setting up the sessions.

GEE WHIZ,  
They said it was  
only a 10-11  
week job, guess  
we need  
training too!

## State Events and Leadership Changes

### KY AARP Hosts DC's

The KY AARP was the site of  
the annual meeting for District  
Coordinators. The event  
brought together the DC's from  
the 12 districts throughout Ken-  
tucky.

The agenda featured presenta-  
tions from state Tax-Aide offi-  
cials and also IRS personnel.

**Delores Wathen**, State Tax-  
Aide Coordinator presided over  
the event on Oct 26-27.

### LC's, SCO's and ERO's

**Bill Ouzts** is moving from Sts.  
Mary & Elizabeth to the Altenheim  
as the Local Coordinator and **Bob  
Pessolano** will be adding Clifton as  
his second LC home. Bob will also  
continue as the LC for Special  
Sites.

**Al Pollock** will become the new  
ERO for Altenheim.

Continuing as SCO's at Lyndon are  
**Jim McKinney** and **Roman Rusi-  
nek**. **Wayne Rudloff** will do the

same at Salem.

Note the change in terminol-  
ogy, SC stands for State Coor-  
dinator but the SC had also  
been used for Shift Coordinat-  
ors. Thus, Shift Coordinators  
(formerly Associate Local Coor-  
dinators), now become SCO's.

**Delores Wathen**, KY SC has  
announced that **Barbara  
Reeves**, of Corbin is the new  
District Coordinator for the Lon-  
don area, District 2.

## Celebrating Our Birthdays



Another year older? Or perhaps  
really another great year of ex-  
perience and wisdom!

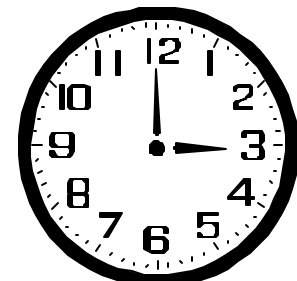
### ....November

- 5 Gerald Dudgeon
- 7 Bruce Schantz
- 17 Cynthia Webster
- 20 Marcia Volpe
- 20 Irene White

**Congratulations &  
Happy Birthday**

### Time to Change the Clock

Fall back is the word on Novem-  
ber 1—be sure to set back your  
clocks for the new time for winter.



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## Headlines Elsewhere

**Something Went Wrong in Jet Crash, Expert Says**

**No \*\*\*\*\*, really? Ya Think**

**Kids Make Nutritious Snacks**

**Do they taste like chicken?**

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

District Coordinators Al Eisert and Dick Trowbridge

### A, B, C, D, E, and now we add **L and M** too!!!!

We are all used to schedules A, B, C, D, etc but now we can add two more—**L and M**!

L and M are just two of several new tax forms and worksheets that we will be using for the 2009 tax returns. Remember L&M from the old days? Had something to do with smoking as we recall—but not now!!!

**Schedule L** will now be needed to determine the "Standard Deduction".

The allowed reduction of the Adjusted Gross Income will be determined by filing status, age, dependency and blindness. Also included for the standard

deduction will be the taxes paid on a new car (purchased after Feb 16, 2009) as well as real estate taxes for those who do not itemize.

**Schedule M** will be needed to calculate the "Making Work Pay Credit" among other things.

Several other forms and schedules have also been changed or added so **rapt attention in class is a must.**



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

### SITE CHANGES

Two sites will have major changes this season. **Oldham County** site is moving to the new library in LaGrange. It is located at 308 Yeager Avenue in downtown LaGrange. This new facility has opened "just in time" since changes were being planned at the former site in Buckner.

The after effects of the heavy rain and flooding that caused the temporary closure of **Sts Mary & Elizabeth** may role into tax season. Most of the facility has re-opened but a mutual decision has been made for the tax space to be temporarily closed for the 2009 season.

Former clients will be redirected to the **Southwest Government Center** on Dixie highway, the **Shively Municipal Building** in Shively, or the **Iroquois Library** at 6th and Woodlawn.

At print time, all other sites were expected to continue in their regular locations. There will also be some reduction in the temporary sites served by the **Special Sites** group.

The complete listing with days and hours will be published in the January edition of **News'N'Notes** and on our web site. Some modest changes are expected in the hours of service but most will be similar to past years.

### EXPENSE REDUCTIONS

As with most organizations, AARP Tax-Aide is not exempt from reduced funding from the foundation, private donors, and the IRS and KY DOR support.

As a first step, **News'N'Notes** will become primarily an electronic item available via the internet. Only a limited number of hard copies will be printed.

Suggestions are being sought for additional ideas and ways to reduce costs. If you have thoughts or suggestions, please share them with one of the District or Local Coordinators. We need to implement significant steps shortly.