

TAX-AIDE NEWS ' N' NOTES



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October 2009

GREATER LOUISVILLE AREA TAX-AIDE

Local Coordinators & ERO's Being Appointed

Several new LC's & ERO's will be taking the reigns of leadership for the 09-10 tax season.

Julia Carey returns to the leadership role as the LC for Altenheim and **Jim Tretter** moves to Hillview as the new LC there. **Sarah Abraham** is the Associate LC for Jeffersontown.

Mary Martin is the new ERO at Clifton and **Cynthia Webster** adds that role at Iroquois. **Abraham** will be the Associate ERO for Jtown.

The sites LC's and ERO's include the following:

Altenheim - **Carey & TBN**

Clifton—TBN & **Martin**

CGC- **Carole Easley** and **Pat Blewett**

EGC - **Bill Kugler**

Hillview- **Tretter**

Iroquois - **Webster**

J-town - **Bill Long & Abraham**

Lyndon - **Roger Crum**

Mt Wash - **Mary Thompson**

Oldham - **George Huber** and **Dave Nuernberger**

Portland - **JB Hitt** and **Judith McCandless**

Salem - **Jim Miller & Bob Lukes**

Shelby - **Marvin Rogers**

Shively - **Monte Gray & Al Eisert**

Spec Sites - **Bob Pessolano**

St Matt - **John Emmerich**

Sts Mary & Eliz - **Bill Ouzts & TBA**

SWGC - **Sherron Bell** and **Martha Dues**

Additional leaders will be named shortly as well as interns, associates and shift coordinators.

Orientation sessions will be held during October and November to help those new to their position get acquainted with their new responsibilities.

Thanks to the above for stepping forward to provide our leadership.

New Volunteer Information/Orientation Continues

HELP NEEDED

The next task is to insure we have a large group of new volunteers and the best recruiters are those that are currently helping.

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

Two options are available for new volunteers to learn about Tax-Aide this fall. Both morning and afternoon sessions will last about an hour and a half so potential volunteers can select the one that best fits their schedule.

Options are:

Oct 23 Fri 10:00 AM

Nov 10 Tues 1:30 PM

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

Bring a Friend

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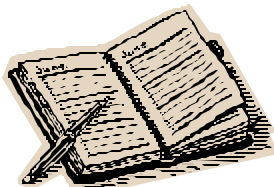
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Happy Halloween !

AARP Tax-Aide has over 32,000 volunteers serving at over 7,000 sites across the United States. It is the largest volunteer tax service in the USA.

*Don't be so open-minded,
Your brains will fall out*



Check the website for last minute changes and updates.

Meet Roman Rusinek, Web Master plus!

Roman Rusinek has volunteered since 2003 and wears many hats.

He is the web master for our web site www.aarp-tax-aide-lou.org providing time regularly year-round to keep it current and pertinent to our purpose and goals.

It is read around the world and we have received requests from the far east and also Europe.

Within the US, several

other Tax-Aide districts have contacted us about using some of our content and format to develop their own sites – a nice form of praise and flattery for Roman.....and well deserved too!

During the season, he serves as Shift Coordinator at the Lyndon site and also assists with the self-study classes in January. We are happy that his wife **Linda** also volunteers as a counselor. Both are also

generous donors. *Many thanks to both for their great services.*

Many of our volunteers wear many hats, some fill as many as four different roles in the organization.

Readers are encouraged to step forward and offer skills that will help too.

Contact your District Coordinator today. Sharing the load makes each of us more efficient and effective in all that we do.

Planning for you personal return?

Those eligible for waiving their minimum distribution from retirement plans need to finalize their plans shortly.

If you have already received your distribution and change your mind, you have until the later of Nov 30 or 60 days after receiving the distribution to roll it over.

Many have decided to waive the distribution for

2009, particularly in view of the market value at the end of 2008.

There is still time to take advantage of a variety of credits, including the purchase of new vehicles, energy credit for home improvements and a variety of other opportunities.

Previous editions of **News 'N' Notes** have listed many of the changes in the tax laws

for 2009.

Draft copies of some of the new tax forms as well as those with major changes and some of the more common including the new schedules L and M and changes to A & B are at the IRS web site.

Worksheets will now be required for several of the more common items including the formerly common standard deductions.

Do You Have A Cell Phone Contact?

We have thought for some time that it would be helpful to have a cell phone at each site for quicker and easier communication. Many volunteers have been generous in using their personal cell at their own expense. We need to be able to contact the 800 help numbers, the clients' brokers, IRS and state tax

offices, etc.

If you have an entre to an official at one of the carriers, such as AT&T, Cricket, Sprint, T-Mobile, Verizon, or any other, we would like to ask if they would consider donating the phone and services to our sites for the 10-11 week season in exchange for recognition at the site

and in our newsletter as well as our web site.

Can you help? Please contact one of the DC's.



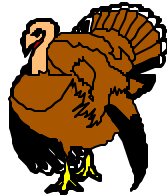
Planning Ahead

October

Interns & Leaders Named
 19 - 9:30 am Orientation
 new LC's 's and SC's.
 19 - 1:30 New ERO Ori-
 entation
 23 - 10:00 am New Vol-
 unteer Orientation
 26-27 DC Meeting
 30 - 9:15 am E-Instructors
 and TC meeting

November

Instructors Meetings
 New E-Filer Orientation
 New Volunteer Orienta-
 tion
 LC Meeting
 Instructor Equip Ready



December

Class Assignments
 Instructor Training
 ERO Meeting & Training



“Specifics and confirmation will be sent directly to those involved in the various meetings”

Thanks for the Extra Help and Donations Too !

Several volunteers provided some extra office help in September—even though it was supposedly not “tax season”.

Thanks to **Sandra Frazier, Jane Hartman, Cheryl Martin, Marcia Volpe and Cynthia Webster**. A job well done and greatly appreciated. (We'll probably call on them again in the near future)

Recent donors of supplies, parts, and equipment include

the following: **Larry Curtis, John Emmerich, and Lois Minter**.

Laptops are at the top of the “needs” list since they can more easily be transported from site to site or stored easily in limited storage space.

Desktops are also welcome so if you or an acquaintance are replacing your old computer, keep Tax-Aide in mind—it's deductible!!! Flat screen monitors are also appreciated.

KY AARP Hosts DC's

The KY AARP will be the site of the annual meeting for District Coordinators. The event brings together the DC's from the 12 districts throughout Kentucky.

The agenda features presentations from state Tax-Aide officials and also IRS personnel.

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

Celebrating Our Birthdays

Another year older? Or perhaps really another great year of experience and wisdom!

....October

- 1 Pat Blewett & Homer Lacy
- 3 Bill Long
- 5 Martha Dues & Jim Medley
- 6 Beverly Ross
- 7 Katherine Games

- 9 Adrian Rosenthal
- 10 David Loewe
- 12 Judy Welsh
- 13 Sherron Bell
- 16 Donna Lucket
- 17 John Emmerich
- 18 Wolf Pressberger
- 20 Connie Emmerich

- 27 Paul Battle & Angus McDougall
- 28 Leon Morrow
- 29 Marty Tittlebaum
- 30 Wilmer Bell

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

Red Tape Holds Up New Bridges

You mean there's something stronger than duct tape?

If Strike Isn't Settled Quickly, It May Last Awhile

Ya think?!

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

New Intake Form for Tax Year 2009

IRS Form 13614-C will replace the Tax-Aide Intake/Interview Form D18445 used in recent years. This will help reduce confusion in the study book and standardize resources used in the TCE/Tax-Aide and VITA programs. It will also include a section on page 3 for the preparer to complete as well as a specific check list for Quality Review.

Clients will no longer need to sign the form but utilizing our service will automatically authorize the IRS and Tax-Aide to retain necessary information for basic carry forward records ex-

cluding financial information. Each site will be limited to its' prior year clients information.

Draft copies of many other new and revised forms are available on the web, www.IRS.gov.

State forms for KY should be available shortly and are expected to be on the KY revenue department web site.

With additional legislation pending later each year, some forms are often not available until the beginning of the filing cycle.

Study materials should arrive prior to Thanksgiving to allow time for thorough preparation prior to the classes in January.

Safe Handling of Flash Drives

"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 and conduct electricity, 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 socket, with no sideways

or up-and-down forces. Don't wiggle the device to insert or remove it.

Straight in, straight out, and you'll avoid the most-common kind of USB connection damage!

