

TAX-AIDE NEWS ' N' NOTES



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August-September 2008

GREATER LOUISVILLE AREA TAX-AIDE

Al Eisert named District Coordinator to replace J Carey

State Coordinator Elmer Olson has announced the appointment of Al Eisert, former Local Coordinator at Shively to be the new District Coordinator, replacing Julia Carey who has served in that role for the past seven years.

Eisert has also served as ERO, TC and E-Instructor and will continue in those roles. He will oversee the Paper Return Classes for the combined Louisville District and also oversee nine sites stretching from Portland to Mt. Washington and Hillview.

Both the west and east Louisville districts are treated as one for practical purposes and Dick Trowbridge will continue as DC for the north and eastern areas

as well as Sr. TC and supervise the E-Classes for both.

Carey will continue in a special relationship with the Louisville Tax-Aide while catching up on other responsibilities. Julia has been the "go to" person for questions around tax law and is well regarded for her important contributions to Tax-Aide.

She and Dick formerly directed the state wide instructor training program for Tax-Aide and implemented several new program aspects that are now used across the nation.

Al has already settled into his new role as plans are made for the coming 2008 Tax Year. **Thanks Julia & welcome Al.**

SMT Changes

In a related announcement, Olson has also named five new persons to the State Management team and also several other District Coordinators across Kentucky. Names may be found on the web site at www.aarp-tax-aide-lou.org and on page 2.

Thanks and appreciation were expressed to Delores Wathen, Grace Ingram, Phyllis McMeans, and Neva Correll for their service to the state-wide program.

Grace originated the electronic filing program in KY and Delores had served as Administrative Specialist after numerous years as the Louisville Dist. Coord.

New Records set in 2007 Tax Year Returns

Almost 3,000,000 served

2,982,962 people were served in the early counts across the US by the Tax-Aide program. Our Great Lakes region accounted for 475,306 and Ky sites served

51,854 at 90 sites through the efforts of 502 volunteers.

The Louisville Districts had over 150 volunteers at 17 regular sites and another 12-14 special sites, serving 13,883 persons.

14,300 returns were prepared, including 2,212 stimulus only, 6,952 federal and 5,146 state returns. Some 10,300 returns were prepared in the prior year when volunteers donated over 14,000 hours of service.

Over 10,000 returns were filed electronically, about 86% of the total regular returns. About 2900 people were helped over the phone or at the sites that had questions regarding preparing their own returns or where to get assistance.

One-third of the returns were joint returns while hundred's needed help filing prior year or amended returns.

Great Job Volunteers!!!!!!

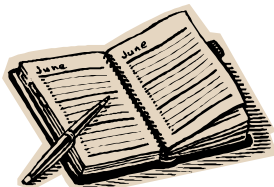
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AARP Tax-Aide has over 32,000 volunteers serving at over 8,000 sites across the United States. It is the largest volunteer tax service in the USA.

**Stimulus
Returns Can
Still Be filed
Thru
October**



Check the website for last minute changes and updates.

State Management Team Appointments

New members of the KY State Management Team for AARP Tax-Aide include the following:

Carl Bush & Earl Williams, Technology Specialists with Carl covering Eastern KY and Earl on the west.

Angela Paquin is the Administrative Specialist.

Bill Risley becomes the Training Specialist.

Susan Buffin will handle

Communications.

The combined team, under the leadership of State Coordinator Elmer Olson will oversee the activities for Kentucky.

Members of the SMT attended training sessions for their new roles in July and will meet together to begin plans for the new tax year in August.

The team will have a three day event with the

12 District Coordinators Nov 5-7 to preview changes and get updates on administrative policies and new tax laws.

Instructor training workshops are expected in early December when the new training and tax materials are anticipated.

Those interested in being on the local instructional teams should contact Al or Dick to indicate their interest immediately.

Are You Planning for you personal return?

You've heard about the story of the shoemaker who did great for others but forgot about caring for his own—are you doing the same about your tax return?

There are a number of things that can influence your personal tax planning for 2008.

Go to the IRS.gov web site and watch for changes that are already

passed that will affect your return.

Your broker will often offer tips about capital gains (and unfortunately about losses too).

Many taxpayers find that the standard deduction is fine on federal returns but itemizing often is beneficial on state returns.

KY auto registration fees are now \$21.00—a

change from prior times.

Mileage reimbursement rates have changed too for both business use and medical transportation.

Our web site has additional hints that may help your planning as we enter the second half of the year.

Watch for changes made by congress as the year end approaches.

Check our website—www.aarp-tax-aide-lou.org

Many thanks to our webmaster, **Roman Rusinek**, for the design and maintenance of our helpful site on the web. Through his efforts, we are reaching people around the world needing help and advice about their income tax.

Both Roman and his wife **Linda** also serve as counselors while he does

double duty as the Associate Local Coordinator for the site at Lyndon Baptist Church.

The web site serves to provide news to the general public and also has two password protected sections. The "LCERO" tab provides special information for LC's and ERO's and the "Active

Volunteer" tab has items for active volunteers.

If you have forgotten your password, contact your DC. It is worth checking regularly since it is updated frequently.

Mark it as one of your favorites—it always has timely and helpful information and hints.

Helping with Stimulus Returns Called for EXTRA EFFORT

Many extra sessions and extra hours were spent by Tax-Aide volunteers as a result of the last minutes changes caused by the Stimulus Rebate Program.

All sites added extra hours, and even extra days in several situations. In addition, additional temporary sites were visited in the broad response from persons not normally filing a tax return.



"I couldn't have filled for my rebate without the help of the Tax-Aide folks. Thank you very, very much—you're really SPECIAL."

Recent Donors...and more gifts welcome—Laptops???

Funding and support for the Tax-Aide program comes primarily from the AARP Foundation and the Internal Revenue Service. Individual and Corporate gifts are also always welcome.

Recent donors include – Ronnie Gordon, William Caster, Roman Rusinek, Bob Lukes, Dick Trowbridge, Julia Carey, Ronald McDonald House, and KY AARP.

Gifts have varied from sup-

plies to equipment such as computers, supplies, copiers filing cabinets, paper and furniture.

Laptops are always 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!!!

Companies find it necessary to

replace their computers on a regular basis so if you have a contact—suggest Tax-Aide.

A big gift that is provided by all volunteers is your time and effort.

**Thank You
For
VOLUNTEERING**

TIME TO UPDATE YOUR PERSONNEL RECORDS

The annual Personnel Record Update has been sent to all active volunteers and needs to be returned promptly.

The form has been redesigned to enable a quick response by phone or e-mail. Each item is numbered so simply identify the correction of choice needed by num-

ber, then call the office at 394-3443 (or your DC).

You can also e-mail your corrections to

LouTax-Aide@insightbb.com.

Of course, you are welcome to mail it back to your DC or the office at 10401 Linn Station Rd, Suite 121, Louisville, KY 40223.

Feel free to circle other positions of interest too. Many of us fill several different roles. Note too item 19, Office Volunteer, if you would like to help in the office, prepare mailing, answer the phone and other related tasks.

Thanks for responding quickly—this month OK?



We always leave the light on for folks that are willing to help.



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**CHECK OUT
THE GREAT
LEADERSHIP
OPPORTUNITIES
FOR LC'S, ERO'S,
INSTRUCTORS &
INTERNS**

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-aidelou.org.

District Coordinators Al Eisert and Dick Trowbridge

LC & ERO APPOINTMENTS COMING SOON

DC's Al and Dick are in the process of confirming the annual appointments and selection of Local Coordinators and Electronic Return Originators.

These positions are one year agreements and occupants are also eligible for other positions in the organization. Both positions are held by the same person at many of the sites.

There are several vacancies in each district so contact either of the DC's if you are interested in these roles or that of an intern in training for future appointment.

Orientation will be in October.

PBT Now National Std.

Process Based Training is now the standard for all training classes across the country.

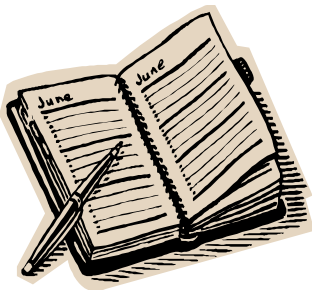
This method has long been used in Louisville and the transition has been seamless locally.

Both Paper and E-Classes will again be available in January, depending upon the experience and interest of each volunteer.

Team teaching is used for both classes and those interested in being an Instructor or Intern should contact Al for Paper classes and Dick for the Electronic classes.

Preliminary planning in Oct.

New Volunteer Information/Orientation Meetings Start



Invite a friend or associate to come to one of the scheduled orientations.

Three options are 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.

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
Sept 24 Wed 1:30 PM
Oct 24 Fri 10:00 AM
Nov 10 Mon 1:30 PM
Advance reservations are pre-

ferred to insure that adequate materials are available.

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.