

TAX-AIDE NEWS ' N' NOTES



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GREATER LOUISVILLE AREA TAX-AIDE

Updating Personnel Records—Leadership Roles Open

The annual updating of personnel records was almost completed in the spring but there are still a few out yet—if you need to update your records, contact the office or your District Coordinator promptly please. Supplies will be ordered shortly.

Several leadership vacancies are open for Local Coordinators (LC's), Electronic Return Operators (ERO's) and Shift Coordinators (SC's). Training and Orientation meetings will be held this fall.

Communication Coordinators are also needed at both the state and district levels—if interested, contact the office at 394-3443.

Office volunteers will also be

needed during the 2009 tax season, Feb 1– Apr 15, 2010.

SMT Changes

Delores Wathen, KY State Coordinator of Tax-Aide, has announced a change on the State Management Team (SMT). **Susan Buffin** has been named as the Training Specialist. During the past season, Susan served as the Communications and Partnership Specialist.

Buffin will be attending a national training event during the summer in preparation for her new role. She will then oversee and direct the training for instructors throughout the 12 districts in KY to be held in December.

Wathen is interested in interviewing candidates for the Communications role. Interested parties can contact her at 502-491-0464 or delky@insightbb.com.

Other members of the SMT include **Angela Paquin**, Administration Specialist and **Carl Bush**, Technology Specialist.

Gelsinger New RC

Bruce Gelsinger, former Coordinator in northern Ohio has been named Regional Coordinator for the Great Lakes Region, replacing **Don Smith** who has completed his allowed service in that role. More details are coming.

New Records set in 2008 Tax Year Returns

Over 3,000,000 served

An estimated 3,000,000+ people were served in the early counts across the US by the Tax-Aide program. Our Great Lakes region accounted for about

500,000 and Ky sites served over 52,000 at 90 sites through the efforts of about 500 volunteers.

The Louisville Districts had 147 volunteers at 17 regular sites and another 12-14 special sites.

Many of the volunteers did double duty, working at two or more sites. 12,346 returns were filed, including 7,000 federal and 5,346 state returns. An additional 1800 returns were prepared but did not need to be filed.

Over 10,500 returns were filed electronically, about 85% of the total regular returns. About 2000 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 and 61% were single 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 7,000 sites across the United States. It is the largest volunteer tax service in the USA.

"...and it is called a Voluntary tax system!"

More Details on 2008 Tax Season

Once again, the Louisville and KY Tax-Aide sites exceed the IRS target for e-filing. With an IRS goal of 80%, the KY and Louisville exceeded 85% for the third year in a row.

Filing Status

Single payers accounted for 60.8 % of the returns, followed by joint with 30 %, then 7.6% Head of Household and Married filing separately with 1.6 %. The ratio was about

the same for the prior year.

Schedules Used

Schedules A & B were filed by about 20% of those filing, actually A= 19.7 % and B=20.2 %. 4.6 % used C-EZ and 11.1 % used D. EIC = 6.1%.

The changes in the law enabled those not filing schedule B to increase their standard deduction.

24.5 % used schedule B in the 2007 tax year.

Looking Ahead

With the extreme changes in the market, much greater use of schedule D is expected for tax year 2009. Net losses are limited to \$3,000 but unused amounts can be carried forward to future tax years. See the article below for items to consider in your strategy.

Are You Planning for you personal return?

Income Tax Credit—a \$400 credit for individuals (\$800 for couples) in both 2009 and 2010. Generally reflected in smaller withholding from paychecks.

Social Security Credit—via a \$250 extra check.

First Home Buyers—an \$8,000 credit if you retain and live in it for 3 years.

New Car buyers—

deduction for sales and excise taxes.

Public Transportation—commuters may set aside pre-tax funds of up to \$230 monthly.

Parent of College Students—a \$2,500 higher education tax credit

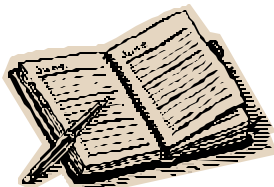
529 Plan Withdrawals—eligible expenses expanded for 2009 and 2010.

Unemployed Workers—first \$2,400 unemployment benefits now excluded from taxes.

People on COBRA—65% premium subsidy now available.

Each of the above has specific rules related to income and other conditions. Go to IRS.gov for complete details.

Lukes Recognized with Volunteer Spotlight



Check the website for last minute changes and updates.

Congratulations are in order for **Bob Lukes** who was in the Volunteer Spotlight of a recent edition of **KY AARP Volunteer News**.

He began volunteering in 1992 and has faithfully worked at the site now located at the Salem United Church of Christ in Louisville. The site was

formerly located in the Bashford Manor Mall.

He helped start the e-filing service for Tax-Aide in the Louisville area and has continued as the states highest volume ERO (electronic return originator). For the past few years, he has transmitted over 1500 electronic federal returns

each tax season that were prepared by the volunteer preparers at the Salem site. About 75% include a KY return too.

Bob also serves as an Instructor and Technology Coordinator while handling the transmissions for the site that is open five days each week.

Great Job Bob !

Helping with your calendar and planning ahead

August	SC's and ERO's -Oct 19	Ion—Nov 10
Instructors & TC's to be named	New Volunteer Orientation—October 23	LC & SC Mtg—Nov 10
	DC Mtg—Oct 26-28	
September	Instructors Mtg—Oct 30	December
Recruitment letters	TC Mtg—Oct 30	Class Assignments
LC's & ERO's selected		Instructor Training
New Volunteer Orientation—Sept 23	November	ERO Mtg—Dec 16
	Instructors Mtg—Nov 2	Please pencil in the events that include you now. Details will follow later.
October	New E-Filers—Nov 3	
	New Volunteer Orienta-	

"Jot it down today—time will creep up more quickly than expected"

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 **Larry Curtis, Al Eisert, John Emerich, Denise Hook, Bill Long, Jim McKinney, Betty & Marvin Rogers, Ian Schill, Dick Trowbridge and KY AARP.**

An anonymous donor provided \$250 towards the purchase of additional equipment.

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!!! Flat screen monitors are also appreciated.

Companies find it necessary to replace their computers on a regular basis so if you have a contact—suggest AARP Tax-Aide. This is a 501 (c) 3 organization.

The greatest gift is provided by volunteers with your time and effort.

**Thank You
For VOLUNTEERING**

TIME TO CELEBRATE...a new feature

Another year older? Or perhaps really another year of experience. Happy Birthday to the following **in August:**

3-Ron Johnson

5-Dick Trowbridge

9-Barbara Malone

11-Joyce Lowe

14-Caroline Rosenthal

15-Gerald Uslander

16-Daniel Weber

17-Jean Ledington

26-Ken Lindsey

30 - Wayne Rudloff

....and in September

7-Bill Giles & Edith Pope

8-Carol Somplatsky-Jarman

10-Monty Gray

11-Evelyn Cooper

13-Dan Dues

And we need dates for many others too—let us know please.

Congratulations—and thanks for providing another year of service to the AARP Foundation Tax-Aide program. Your experience counts with us.

**AARP TAX-AIDE**

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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 "Newsletters" tab at www.aarp-tax-aide-lou.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.

Newspaper & TV Support

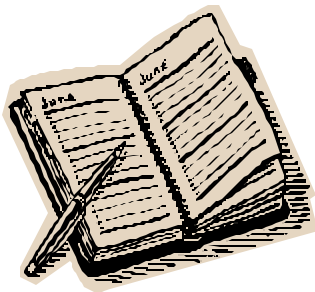
A big thank you goes out to the **Louisville Courier-Journal** and the **local TV and radio stations** for their support during the past season.

We're looking forward to their continued help and support during the coming tax season too. Many changes in the tax laws need broader coverage and updating for the general public.

A number of other publications and newsletters in various organizations have also been very generous in their support.

Thanks to one and all!

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 23 Wed 1:30 PM

Oct 23 Fri 10:00 AM

Nov 10 Tues 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.