

Tax-Aide News' N' Notes

Service Pin Awards for 2008

Inside this issue:

Sites Schedule	2
Weather Policy	3
AMT Causes Delay	3
IRS Honors KY AARP	3
Site Reminders	4
Award Pictures	4

E-mail Rules to Remember:

- If it can be transmitted electronically anywhere, it will be transmitted everywhere.
- Don't hit "send" unless it is okay if your mom reads the e-mail.
- E-mail lives forever.

Volunteer

25 Years

Alice Hannah

20 Years

LaVerne Gagel

15 Years

Bill Long

Jay Sparrow

10 Years

Barney Davis

Lee Fowler

Gladys Letterman

Mary Jo Morgan

Betty Rogers

Linda Seidenfaden

Jerry Uslander

5 Years

Gordon Bell

Sherron Bell

Pat Buckley

Chester Collier

Larry Curtis

Jerrye Davis

Margaret Edmonds

Jim Ewing

Bill Giles

Charlotte Huber

George Huber

Linda Hulsey

Larry Johnson

John Motts

Barbara Simon

Marcia Volpe

Cynthia Webster

Nellus Wilson

Site

Central Government Center

Sts Mary & Elizabeth Hospital

Jeffersontown Senior Citizens Center

Hillview City Hall

Southwest Government Center

Salem United Church of Christ

Iroquois Library, Sts Mary & Elizabeth Hos

Central Government Center

Shelbyville Highland Baptist Church

Salem United Church of Christ

Salem United Church of Christ

Southwest Government Center

Southwest Government Center

Portland Library

Shelbyville Highland Baptist Church

Administrative Computer Tech

Portland & Iroquois Libraries

Shively Municipal Bldg, Hillview City Hall

East Government Center

Urban Government Center

Lyndon Baptist Church

Oldham County, Portland Library

East Government Center

Oldham County Com/Conv Center

Shelbyville Highland Baptist Church

Shively Municipal Building

Lyndon Baptist Church

Iroquois Library

Central Government Center

2008 Sites Schedule

JEFFERSON COUNTY

<u>SITE LOCATION</u>	<u>DAYS OPEN</u>	<u>HOURS</u>	<u>ADD'L FEBRUARY HOURS</u>
Central Government Center 7201 Outer Loop	Mon & Wed	9 - 1	
Clifton Christian Church 131 Vernon Avenue	Wednesday	Noon - 4	
East Government Center 200 Juneau Drive	Monday	10 - 2	Friday 10 - 2
Iroquois Branch Library 601 Woodlawn	Friday	11 - 3	Tuesday 11 - 3
Jeffersontown Senior Citizen Center 10631 Watterson Trail	Tuesday	9:30 - 1:30	
Lyndon Baptist Church 8025 New LaGrange Road	Tue & Wed Thursday Saturday	12:30 - 4:30 12:30 - 8 10 - 2	
Portland Branch Library 3305 Northwestern Parkway	Tuesday	11 - 3	Thursday 11 - 3
Salem United Church of Christ 3408 Newburg Road	M, W, F T & Th	11 - 3 11 - 5	
Sts Mary & Elizabeth Hospital 1850 Bluegrass Avenue	Tuesday	11 - 3	Thursday 11 - 3
St Matthews Atria Center 120 South Hubbards Lane	Friday	10:30 - 2:30	
Shively Municipal Building 3920 Dixie Highway	Monday	10 - 2	Wednesday 10 - 2
Southwest Government Center 7219 Dixie Highway	Thursday	9 - 1	Tuesday 9 - 1
Urban Government Center 810 Barret Avenue	Wednesday	Noon - 4	

BULLITT COUNTY

Hillview City Hall 298 Prairie Drive Hillview	Tuesday	9 - 1	
Mt Washington Library 311 Snapp Street Mt Washington	Wednesday	9:30 - 1:30	

OLDHAM COUNTY

Oldham County Com/Conv Center 1551 N Highway 392 Buckner	Monday	Noon - 4	Friday 9 - 1
---	--------	----------	--------------

SHELBY COUNTY

Highland Baptist Church 511 Mount Eden Road Shelbyville	Thursday	9 - 1	Mon Feb 11 & 18, 9 - 1
--	----------	-------	------------------------

SPECIAL SITES & SHUTINS

Available by Appointment - Call (502) 394-3443

Special Sites Schedule was published in the January 2008 edition of *Tax-Aide News' N' Notes*.

Weather Policy

A recent snow revealed that our weather policy “We follow Jefferson County Public Schools” needs clarification. If schools have a two hour weather delay, that generally means schools open at 10:00 am since most schools have a starting time of around 8:00. Then Tax-Aide

will also open at 10:00. Perhaps our weather policy can be restated “Tax-Aide opens when schools open”. If the schools announce a one hour delay, Tax-Aide is not effected since the earliest any sites open is 9:00. To be sure, contact your Local Coordinator.

Thanks to our instructors for all your time and devotion to January classes. All volunteers are grateful for your extra service.

LCs & EROs

Reports for the period

February 1 - 23 are due before
February 28.

AMT Will Cause Delay until February 12 for Some Returns

Due to the late action by Congress in changing the Alternative Minimum Tax law, some returns will have a delay in submission and processing. With the late act, IRS has to change some tax forms and the computer system. Also, the IRS software used by Tax-Aide, TaxWise, has to be updated. **Tax returns that need these forms will be delayed until AFTER**

February 11 for both electronic and paper returns:

- Form 8863 - Education Credits
- Form 5695 - Residential Energy Credits
- Form 1040A's

Schedule 2, Child & Dependent Care Expenses for Form 1040A filer.

Do not submit, either paper or electronically prepared returns, until after February 11, if these forms are part of the return package: Form 8863 (Education Credits), Form 5695 (Energy Credits) or Form 1040A, Schedule 2 (Child Care Expenses).

IRS Recognizes AARP Kentucky State Office for Tax-Aide Support

The Internal Revenue Service officially recognized the AARP Kentucky State Office for its valuable support and assistance to Kentucky AARP Tax-Aide. IRS Regional Manager Vicki Fairly signed a certificate of appreciation. The plaque was accepted by



Phil Peters, State Director. Shown at left is Peters, Senior Administrative Associate Cheryl Martin and Tax-Aide District Coordinator Julia Carey. Included in the recognition are Hal Stopfel, Associate State Director, and Jane Hartman, Senior Office Administrator.

AARP TAX-AIDE

10401 Linn Station Road, Suite 121
Louisville, KY 40223
(502) 394-3443
loutax-aide@insightbb.com

District Coordinators
Dick Trowbridge
Julia Carey

People Helping People

We're on the web!
www.aarp-tax-aide-lou.org

Tax-Aide News' N' Notes is a publication for volunteers of AARP Tax-Aide in Bullitt, Henry, Jefferson, Oldham, Shelby and Spencer Counties, Kentucky.

REMINDERS:

- Sites will be open President's Day, February 18.
- Snow! If Jefferson County Public Schools have a snow delay, Tax-Aide sites open when schools open.
- At sites, always wear your name badge and blue volunteer ribbon.
- Have to miss one day? Tell your Local Coordinator ASAP.
- Arrive at your site at least 15 (preferably 30) minutes early & help set up site materials and equipment.
- Bring calculator, Pub 17, spiral book, 1040 instruction book, 740 instruction book, scratch paper, pencils, pens, water, snack.
- Wear your Tax-Aide blue denim shirt with pride.
- Attend to personal hygiene.
- Display a positive attitude.
- Smile! Relax! Enjoy Volunteering!

The Internal Revenue Service will not prepare income tax returns for those whose income exceeds \$40,000.

235 Years of Service to Tax-Aide

Look at the 29 names of volunteers shown on page one of this newsletter. These folks have given 235 years service, collectively, to Tax-Aide.

Alice Hannah, Central Government Center, pictured here with DC Julia Carey and LC Carol Easley has 25 years of service.

LaVerne Gagel, Sts Mary and Elizabeth Hospital, shown with DCs Julia Carey and

Dick Trowbridge, has 20 years of service. Both were recognized with pins, plaques and cakes during their January classes.



Congratulations and appreciation to all Service Pin recipients.