

# TAX-AIDE NEWS ' N' NOTES



Volume 8, Issue 6

February 2009

## GREATER LOUISVILLE AREA TAX-AIDE

### 145 Years Volunteer Service

Fifteen volunteers have accumulated 145 years of service.

#### 25 Years – started 1985

Dick Trowbridge -DC

#### 20 Years – started 1990

Katherine Games - CGC

#### 15 Years – started 1995

Roger Crum—Lyndon

Marvin Rogers - Shelby

#### 10 Years – started 2000

Evelyn Cooper - Salem

John Emmerich - St Matt

Carol Paglino - Oldham

#### 5 Years – started 2005

William Caster - Sts M&E

Linda Hulseay - EGC

Joyce Lowe - Sts M&E

Lois Minter - Salem

Karen Noer - Spec Sites

Robert Pessolano - Spec Sites

William Schook—Hillview

Lynn Snyder—Iroquois

Thanks to each of the above for their dedicated service. Our faithful volunteers are recognized with service pins on each five year anniversary of their service.

Those listed have helped at various sites throughout the Greater Louisville service area. Some have served in as many as seven or eight states .



**Above: Katherine Games displays her cake**

The current primary site is listed for each as they reach this banner anniversary in 2009. Several give two or more days each week during the tax season and a couple volunteer five or six days weekly.

Congratulations for your many years of excellent service.

### Caution—Don't File Too Early!!!!!!!!!!!!!!

I want my refund ASAP! That's a familiar sound as sites open in February but that old saying, "**Haste makes waste**" is true for many early filers.

Persons who have investments in mutual funds, REIT's, and

similar vehicles often receive corrected 1099's even into early March so this can cause problems, often causing the taxpayer to return and have their return amended. This is inconvenient for both the taxpayer and Tax-

Aide and can generally be avoided simply by waiting until mid-March to file.

**Below-State Coordinator Delores Wathen presents plaque to Katherine Games.**

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## IMPORTANT DATES

Feb 2—Apr 15

Sites will be open as scheduled, Mon—Sat.

Sites will also be open on general holidays that fall during the week.

Closures occur only when the weather is inclement. Check for school closings in the respective school districts. Sites are open regular hours when there are delayed school hours.

Mar 3—Feb stats due

Apr 3—Mar stats due

Apr 20—Apr stats due  
Leaders Meeting

*The cardi-  
ologist's  
diet: If it  
tastes good,  
spit it out.*



***It's Tax Time***

## Welcome New Volunteers

We're pleased to welcome another great group of new volunteers to AARP Tax-Aide. They come from a variety of backgrounds and all have passed the necessary certification tests for Tax-Aide, federal and state competency tests,

**Lewis Clifton**

**Joe Glasser**

**Doris Herp**

**Terry Hockensmith**

**Patricia Hurst**

**Betty Jackson**

**Ron Johnson**

**David Loewe**

**Brenda Malone**

**Gail Moody**

**Rita Morrow**

**Edith Pope**

**Bruce Schantz**

**Margaret Skeen**

### *Class reviews returns*



## Personal Tax Planning & Savings Ideas

### RECENT DONORS

Santa was good to several friends of Tax-Aide that donated equipment, supplies and/or services since our last listing.

Thanks to **Earl Albin, Bill Giles, Ron Gordon, Honeywell Corp (via Roman Rusinck), Donna Peck, Matthew Woodward, and Muriel Trowbridge.**

These gifts make our job easier and quicker too—you may be able to claim a deduction too.

### COST RECORDS

Maintaining accurate records of the costs and dates of acquisition are important. When capital items are sold, these are required when determining if a gain or loss has occurred. Develop your permanent records now

and be sure to keep them up to date.

The same is true for items you donate to charity. Tax-Aide volunteers can prepare the necessary forms but depend solely on the taxpayer to provide accurate information.

Charts are available for fair market values to establish the value of various items.

## Awards & Recognition of a Job Well Done

**Bonnie Speedy**, Tax-Aide Director, has announced two important awards received by Tax-Aide recently.

The AARP Foundation Board has commended Tax-Aide volunteers for excellence and commitment through leadership, energy and resilience in meeting the challenge of

the economic stimulus package.

The IRS bestowed TA the "Wage and Investment Division Commissioner's Award" - we were one of only two recipients of this award.

AARP Tax-Aide handled 504,991 stimulus only returns...in addition to helping another

2,602,264 taxpayers with regular returns. Not bad for a group of about 32,000 volunteers!!!!

In KY, we helped over 36,000 with federal returns and also almost 16,000 state returns.

Locally, we spent over 14,500 hours providing free service to our communities.

## Special Sites Announces Initial Schedule

Site Location	Days Open	Hours Open
Main Library Downtown 301 York Street	Sat. Feb 14, Mar 14,21,28	10 am – 2 pm
Ponder Creek 620 Valley College Dr	Thurs, Feb 12	10 am – 2 pm
Chapel House 945 S 5th St	Thurs, Mar 19	Noon – 4 pm
Friendship House 900 S 4th St	Thurs, Mar 12	Noon – 4 pm
Forum 200 Brookside Dr	Thurs, Apr 9	9:30 am – 1:30 pm
Brownsboro Park	Sat, Apr 4	10 am – 2 pm
Treyton Oak Tower 211 West Oak	Thurs, Mar 26	9:30 am -1:30 pm
Goodwill 600 Broadway	Fri & Sat Feb 6 & 7	9:30 am – 1:30 pm
Presbyterian Home	Tues, Mar 31	10 am – 2 pm

*Shut-in service is available on a very limited basis and only to those unable to leave their home.*

**The AARP Tax-Aide program is sponsored by the AARP Foundation in cooperation with the Internal Revenue Service.**

**It has over 32,000 volunteers and in excess of 7,500 sites and is the largest volunteer tax preparation group in the nation. It is the major group in the IRS Tax Counseling for the Elderly.**

**The service is free to all persons needing assistance in preparing their federal and state tax returns.**

This is a preliminary listing, changes may be made during the season.

We attended our tax training classes in January



**Bundle up—it's cold outside!**



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**Watch for  
INTERIM  
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NEWS REPORTS  
AT**

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

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

**District Coordinators Al Eisert and Dick Trowbridge**

**NOTICE**

**To have your taxes prepared properly,**

**YOU MUST HAVE**

IRS Notice 1378

showing the amount you received for the  
Economic Stimulus Payment or  
definite knowledge of the amount received in 2008.

Call 1-866-234-2942 or

<http://www.irs.gov/individuals/article/0,,id=185471,00.html>

**Do it today!**

**Please  
Wear  
Your  
Denim  
Shirt,  
name  
Badge,  
Blue  
Ribbon  
And  
SMILE,  
SMILE,  
SMILE**

**WHOOPS**

Our January issue inadvertently called Jim McKinney by the last name of McKinley. Sorry for our error Jim .



**Remember Your  
Sweetheart**

**We're all ready to help with taxes !!!**

**EXTRA HELP NEEDED**

We typically will prepare about half of the seasons returns during the month of February, thus the reason for several sites to have extended hours and extra days of service in February.

Counselors are encouraged to put in extra sessions and extended hours to help handle the heavy load in February. Be sure to offer your help to your LC or DC—maybe even helping at another site a few times.

**Special Sites needs help too.**

**Sign up Today Please**

**Call 394-3443**