

# TAX-AIDE NEWS ' N' NOTES



Volume 8, Issue 5

January 2009

GREATER LOUISVILLE AREABUSINESS NAME

## Many Changes for Louisville Tax-Aide

As the new year begins, several changes have occurred in our leadership group.

**Al Eisert** is now the District Coordinator for District 10, serving the nine sites in western and southern Jefferson county and also Bullitt county.

Signing on as new Local Coordinators are **Jerrye Davis** at Altenheim, **Cynthia Webster** at Iroquois, **George Huber** at Oldham county, **Monty Gray** at Shively, and **Bill Ouzts** at Sts Mary & Elizabeth.

New ERO's (Electronic Return Originators) include **Jerrye Davis** at Altenheim, **Pat Blewett** at Central Government Center, and **Jim Tretter** at Iroquois.

Shift Coordinators include **Wayne Rudloff** at Salem and **Jim McKinley** and **Roman Rusinek** at Lyndon.

Joining the paper instructors is **Monty Gray** while **Sarah Abraham**, **Bill Kugler** and **Dave Nuermberger** are instructing E-Fileers.

Coupling all the above leaders with the numerous changes in the tax laws and forms should contribute to an interesting tax season.

The addition of about 16-18 new volunteers will help offset an almost equal number of those that have moved or retired since last season.

## Bill Jasper

Volunteers were saddened by the news of the recent death of **Bill Jasper**, a favorite and faithful leader for Tax-Aide. His fatal illness was diagnosed just seven weeks before his death.

Wearing many hats, Bill served as an Electronic Instructor, Technology Coordinator, and as the Local Coordinator and Electronic Return Originator for the Iroquois Library site. In addition, he was the liaison with the Louisville Free Public Library System and Tax-Aide.

He is survived by his wife Linda, son David and a granddaughter.

An anonymous donor has provided a new printer in his honor and memory.

## Tax Laws Changing at both State and Federal Levels

Both the state and federal legislatures have made several changes in the laws for the 2008 tax returns. Some of the changes are noted in this issue of **News 'N' Notes** and all will be covered in depth in class.

**AARP Tax-Aide counselors can prepare the following for federal returns:**

1040EZ, 1040A with schedules 1,2 3 and EIC; 1040 with A,B,C-EZ, R, simple D, 1040V, 1040-ES and 1040-X.

In addition, Forms :2106-EZ, 2441, 8880, 8812, 8863, 9465, 8379 and contributions to Charities from an IRA.

Limited schedule K1 that provides information only for schedule B or D. Other entries from K-I will not be handled and should be referred to a professional preparer.

### ITEMS NOT BEING PREPARED

Schedules C, lengthy D's, E if depreciation is involved, F, 2106, 3903, and 8615.

**AARP Tax-Aide** was originated to assist low and moderate income taxpayers, with special attention to those age 60 and over.

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## IMPORTANT DATES

See class schedules on page 3.

Jan 15 Last estimated payment due for 2008

Jan 26-29 Site Meetings

Jan 30 LC's will meet both separately and with their CF's.

Feb 2 Sites begin services to clients

Mar 3 Activity Report due for February

Apr 3 Activity Report due for March

*I was married  
by a judge. I  
should have  
asked for a jury.*

*-- Groucho  
Marx*



**Happy  
New Year**

## NEW ITEMS IN SCOPE FOR 2008 RETURNS

**Rental & Royalty Income** on 1099-MISC is now within the scope of forms that can be completed by Tax-Aide counselors. This is to be reported on Schedule E but cannot be done if there are any related expenses.

Amounts are reported via boxes 1 and 2 on the 1099-MISC. Information is carried forward to Part 1 of Schedule E. TaxWise provides links for these forms.

**IRA Non-Deductible Contributions** may now be reported on Form 8606. This is an alternative way of increasing the value of the IRA by taxpayers are limited by their income or by another retirement plan.

Combined deductible and non-deductible cannot exceed the maximum of \$5,000 (\$6,000 for those over age 50).

Get details in class.

### Non-Cash Contributions

Persons contributing over \$500 (but less than \$5,000) may now be assisted by using Form 8283. Amounts over \$5,000 must be referred to professional preparers.

Taxpayers must provide both the original cost as well as the fair market value of the items donated to charity

Results are carried forward to Schedule A..

## Personal Tax Planning & Savings Ideas

The current changes taking place in the economy challenges all tax papers to make wise decisions for both the short term and the long term.

Investors should consult their brokers and tax advisors regarding new strategies for coping with the future.

Little things can add up quickly as pennies turn into dollars.

Coupons can sometimes save as much as 50% or more, particularly when stores run doubling and tripling specials.

One volunteer noted that they had saved almost \$1200 during 2008 at the grocery store alone. Persons who eat out regularly can often find \$5 off and half-price deals. Purchasing diners cards often saves 20-25%.

Prompt payment may result in an additional 2-5% savings.

Using credit cards may also save as much as 5% or more—BUT only if you pay the monthly bill in full on time.

Other stores and merchants will sometimes offer discounts for cash payments too!

Plan ahead—it pays.

## Local Coordinators prepare for new season

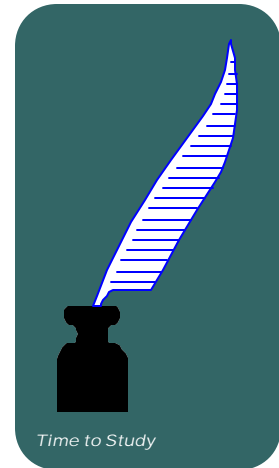
Local Coordinators met recently to plan for the coming season.

They'll meet again on Jan 30 to make final plans for the 2008 tax year and open sites beginning in Feb.



## January Classes

<b>Jan 6-9</b>	<b>T-F</b>	<b>ERO's</b>	<b>KEY</b>
<b>Jan 7-8</b>	<b>W-Th</b>	<b>P-Sr</b>	<b>P= Paper class</b>
<b>Jan 10&amp;17</b>	<b>Sat's</b>	<b>E-Self Study</b>	<b>E= E-File class</b>
<b>Jan 12-16</b>	<b>M-F</b>	<b>P-Beg</b>	<b>CF= Client Facilitator</b>
<b>Jan 12-13</b>	<b>M-T</b>	<b>E-Sr -1</b>	<b>Practice for E-File is</b>
<b>Jan 14-16</b>	<b>W-F</b>	<b>E-Beg</b>	<b>available both before</b>
<b>Jan 19-20</b>	<b>M-T</b>	<b>E-Sr -2</b>	<b>and after class M-S</b>
<b>Jan 20-22</b>	<b>T-Th</b>	<b>E-Int</b>	
<b>Jan 21-22</b>	<b>W-Th</b>	<b>E-Sr -3</b>	<b>Most classes</b>
<b>Jan 30</b>	<b>F-am</b>	<b>CF &amp; LC's</b>	<b>meet 9am-4pm</b>
<b>Jan 30</b>	<b>F-pm</b>	<b>CF &amp; LC's</b>	



## Instructors Attend Workshop to sharpen skills



L-R E-Instructors **Dick Trowbridge, Bob Lukes, Dave Nuernberger, Sarah Abraham and Bill Kugler. Al Eisert and John Emmerich** not in picture

The instructors met at Rough River State Park for the three day event. In addition to the program for preparers, additional sessions were also held for those that train ERO's and TC's/

*Pictured above to the right are Paper Instructors **Carol Easley, Jean Ledington, Dan Dues, Martha Dues, Jim McKinley and also Bill Long, E-Instructor. Monty Gray** not in pic.*



Both Ledington and Lukes made presentations to the group involving new forms and KY. State Training Specialist **Bill Risley** directed the event.

## IRS Announces VITA/TCE Progress in 2008 -AARP Tax-Aide Leads the Way

IRS Acting Cincinnati SPEC Territory Manager Ryan Kinikin and his staff presented updates at the recent meeting of District Coordinators regarding the progress of the VITA/TCE programs conducted in 2008.

Almost 3,500,000 returns were prepared nationally, an increase of 33% while 83%, over 2,900,000 were e-filed, up 30%. Over 326,000 stimulus returns

were also filed.

**AARP Tax-Aide contributed strongly with the following:**

**322,00 paper returns, up 29%**

**1,516,000 e-files, up 27%**

**1,032,000 state returns, up 23%**

Tax-Aide provides over 32,000 of the almost 79,000 volunteers worldwide and also manages about 7,500 of the 11,800 sites.

VITA (Volunteers In Tax Assistance) and TCE (Tax Counseling for the Elderly) both provide free income tax assistance throughout the country. AARP Tax-Aide participates in the TCE program.

AARP Tax-Aide is a joint program of the AARP Foundation and the IRS and is celebrating 41 years service in 2009.

## AARP TAX-AIDE FREE INCOME TAX PREPARATION ASSISTANCE

*Sponsored by the AARP Foundation and the Internal Revenue Service*

February 1 thru April 15, 2009

### JEFFERSON COUNTY

<u>Site Location</u>	<u>Day Open</u>	<u>Service Hours</u>	<u>Additional February Hours</u>
Altenheim 936 Barrett Ave 40204	Wed	10 AM - 2 PM	
Central Government Center 7201 Outer Loop 40228	Mon & Wed	9 AM - 1 PM	
Clifton Christian Church 131Vernon Ave 40206	Wednesday	Noon - 4 PM	
East Government Center 200 Juneau Drive 40243	Monday	10 AM - 2 PM	Fri 10AM-2PM
Iroquois Branch Library 6th and Woodlawn Sts 40215	Friday	11 AM - 3 PM	Tues. 11AM-3PM
Jeffersontown Sr Citz Ctr 10631 Watterson Trail 40299	Tuesday	9:30 AM - 1:30 PM	
Lyndon Baptist Church 8025 New LaGrange Road 40222	Tues, Wed, Thurs	12:30 PM - 4:30 PM	
		Thurs 4-8PM ; Sat 10AM-2PM	
Portland Branch Library 3305 Northwestern Pkwy 40212	Tuesday	Noon - 4 PM	Thurs Noon-4PM
Salem United Church of Christ 3408 Newburg Road 40218	Mon, Wed, Fri	11 AM - 3 PM	
	Tues & Thursday	11 AM - 5 PM	
Shively Municipal Bldg 3920 Dixie Hwy 40216	Monday	10 AM - 2 PM	Wed 10AM-2PM

Special Sites and Shut-Ins

By Appointment and Special Arrangements, leave message at 394-3443

i.e. Downtown & other Branch Libraries, Eminence, Taylorsville, Senior Centers, Nursing Homes, Assisted Living Centers

## AARP TAX-AIDE FREE INCOME TAX PREPARATION ASSISTANCE

*Sponsored by the AARP Foundation and the Internal Revenue Service*

February 1 thru April 15, 2009

### JEFFERSON COUNTY (Continued)

<u>Site Location</u>	<u>Day Open</u>	<u>Service Hours</u>	<u>Additional February Hours</u>
St. Matthews Atria Center 120 S Hubbards Lane 40207	Friday	10 AM - 2 PM	
Sts Mary & Elizabeth Hosp Plaza 1, 4402 Churchman Ave 40215	Tuesday	11 AM - 3 PM	Thurs 11AM-3PM
Southwest Government Center 7219 Dixie Hwy 40258	Thursday	9 AM - 1 PM	Tues 9AM-1PM

### BULLITT COUNTY

Mt Washington Library 311 Snapp St 40047	Wednesday	9:30 AM – 1:30 PM	
Hillview City Hall 298 Prairie Drive 40229	Tuesday	9 AM - 1 PM	

### OLDHAM COUNTY

Oldham County Com/Conv Ctr 1551 N Hwy 393, Buckner 40031	Monday	Noon - 4 PM	Fri 9AM-1PM
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### SHELBY COUNTY

Highland Baptist Church 511 Mount Eden Road Shelbyville 40065	Thursday	9 AM - 1 PM	Mon, Feb 9 & 16 By Appointment
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### HENRY & SPENCER COUNTIES

(See Shelby County)

See also [www.aarp-tax-aide-lou.org](http://www.aarp-tax-aide-lou.org) or call 502-394-3443 or e-mail [LouTax-Aide@insightbb.com](mailto:LouTax-Aide@insightbb.com)



AARP TAX-AIDE  
10401 Linn Station Road  
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Louisville, KY 40223

502-394-3443  
LouTax-Aide@insightbb.com  
www.aarp-tax-aide-lou.org

**Watch for  
INTERIM  
UPDATES &  
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. It 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**

## WHOOOPS!!!

The newly designed Intake & Interview Form (which also serves as the checklist for Quality Review) has an error on item 17, it should read \$3,500, NOT \$3,400.

All clients are required to fill out the form upon arrival at the site. It may be previewed by the Client Facilitator or Screener prior to the interview by the preparer.

The CF or Screener may also help identify attachments, inquire about cost figures, and put forms in order.

The person performing the Quality Review will also use it as the return is reviewed.

## HELP PLEASE

Help is needed for two things beyond working at your regular site.

Special Sites needs help throughout the season as visits are made throughout the service area to various locations on a one day basis.

During February, several sites add extra days to help handle the volume and volunteers are needed to help with the extra load.

Please sign up for either or both of these needs at your class in January. Both paper and e-file help is needed. Thanks for stepping forward and helping.

## THANK YOU

Our thanks to the **Buechel Fire Department, Salem United Church of Christ, and KY AARP** for providing facilities for our January classes. In addition, KY AARP provides space year around and Salem provides space for the busiest Tax-Aide site in the state.

Thanks too to recent donors **Larry Curtis, Al Eisert, John Emmerich, Bill Long, Ronald McDonald House, Barbara Simon and Dick Trowbridge**. Our computer equipment continues to grow with gifts from our volunteers and other interested groups.

If Santa brought you a new computer, we would be pleased to receive your old one—even if only for parts.

## HAPPENINGS & COMING EVENTS

### 25 YEARS SERVICE

District Coordinator **Dick Trowbridge** was recognized at a recent DC meeting for his 25 years service as an AARP Tax-Aide volunteer. State Coordinator **Delores Wathen** presented him with a plaque and special pin in recognition of the event.

Volunteers are recognized at five year intervals for their volunteer service. Presentations will be made during the January class sessions. Watch for the listing in the February newsletter.

Louisville is fortunate is having several who served in excess of 25 years, including **Ethel Webster** who started in 1982 and **Alice Hannah** in 1984. Dick

began in 1985. 20 others will receive pins for 5,10,15 and 20 years service.

### PROPER ATTIRE PLEASE

If your name tag is showing wear, be sure to ask for a new one at class or from your LC. New ribbons are also available.

Blue denim shirts are also requested while working at a site to easily identify you as a qualified volunteer. Some prefer to wear it as an overblouse or jacket.

A Professional neat appearance is preferred by all and gentlemen are reminded that hats or caps are not appropriate when serving clients.

Use hand sanitizer often too.