



Prepare for January Classes

- Be early; arrive about 10 minutes before class.
- Read the text material, work the exercises and problems before class.
- Participate in class; ask questions but don't monopolize class time with war stories and personal comments.
- What to wear? **A smile!**

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January Classes will Emphasize Kentucky Income Tax Law

Every year the feedback from Local Coordinators is that tax counselors need more training on Kentucky income tax law. This is true for both beginner and experienced counselors.

Beginner counselors seemed confused about the differences in Federal and Kentucky tax law. Some have problems computing the Family Size Tax Credit while both beginner and experienced have some difficulty with Kentucky Schedule P (pensions), out of state gambling winnings and how to complete Kentucky 740-NR.

There are several reasons for this:

- Even though Kentucky

provides Form 740 instruction books and a Tax-Aide special edition book, neither are textbooks similar to those furnished by IRS

- Because it follows the US Tax Code, Kentucky tax law is typically taught at the end of class when students, particularly beginners, have been exposed to long hours of class (beginner class is 30 hours), and they are tired
- There have not been instructors available who have a solid Kentucky tax background.

Last year, the retired District Manager of the Louisville

area office of the Kentucky Department of Revenue joined Tax-Aide as a counselor. **Monty Gray**, who supervised nine counties for the Kentucky Department of Revenue, has agreed to teach Kentucky tax law to all classes this year. Monty is now preparing for this busy task which includes teaching six e-file and three paper classes during January.

We are so grateful that Monty is taking on this responsibility, and we thank him for agreeing to do this.

Counselors and Local Coordinators who have Kentucky Tax questions, save them for Monty's classes.

Recruiting New Volunteers

There is only one New Prospect Orientation left to attend. It is scheduled for **Tuesday, November 13, 1:30 pm** at the AARP Office.

Unfortunately, this has been a "slow" recruiting year, and we really need more new counselors. If you know acquaintances who may be

interested, please invite them to attend this last orientation. Call 394-3443 to register.

New Textbooks for Classes

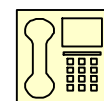
Books are to be shipped to students via UPS Thanksgiving week. IRS Publication 17 will be mailed to volunteers in December.

How to Volunteer

Go to our website and fill out an application:

www.aarp-tax-aide-lou.org

or call 394-3443. Calls will be returned within 24 hours.



Kentucky Standard Deduction

The Kentucky Department of Revenue has announced that the standard deduction for 2007 is \$2,050, an increase of \$80 from 2006.

Special thanks to Judy Haliday, Jerrye and Barney Davis for their assistance with the newsletters.

Weather & Classes

For weather, we follow Jefferson County Public Schools. If they are closed, so are we. If JCPS are open, we are too.

Louisville Leaders Help Train Instructors

Several local leaders will again be assisting with the training programs for instructors at the State Instructors workshops. Bill Jasper, Bill Long and Bob Lukes will be assisting at the Rough River training session in December and Lukes will also be doing similar duty at the Blue Lick workshop too.

Long will also be assisting State Technology Specialist Grace Ingram with local classes in several other communities. John Emmerich will be involved in a Train the Trainer's seminar

on TaxWise in Cincinnati and Julia Carey will be participating in the UK Tax Seminar. Dick Trowbridge will be attending the Federal/State E-Filing Seminar sponsored by the IRS and KYDOR.

All fourteen of our local instructors will be going to the workshop at Rough River in preparation for leading over a dozen classes planned locally. We use the team teaching approach with 2-6 instructors relating to each class.

Both Carey and Trowbridge

have served in earlier years as the State Training Specialists and planned and organized the state-wide instructor training programs. Many other Louisville volunteers have long been involved in making presentations at the state instructors workshops and have asked for relief and suggested that leaders from other districts might enjoy being more involved in the presentations.

Flash Drive Donations

Bill Jasper is added to the list of donors to Tax-Aide.

Tax-Aide Calendar

November 7, 10 am - Paper Instructors Meeting

November 9, 1:30 pm - New E-File Orientation

November 12, 9:30 am - LC Meeting

November 13, 1:30 pm - New Prospect Orientation

December 10 - 12, Ken-

tucky Instructors Workshop at Rough River State Park

January 7, 2008 - Classes begin

January 28, 2008 - Last day of classes

January 29 - 31, 2008 - Site Staff Meetings

January 30, 2008 - All

grades and tests due from Instructors to DCs

February 1, 2008 - Sites open (finally, after all these months of preparation)

All meetings are at the AARP Office unless otherwise noted.

Instructors for January Classes

Instructors for January classes have been named:

Dan Dues, Martha Dues, Carol Easley, Al Eisert, John Emmerich, Monty Gray, Bill Jasper, Jean Ledington, Bill Long, Bob Lukes, Jim McKinney, Donna Peak, Dick Trowbridge and Julia Carey.

All will attend the Kentucky

Tax-Aide Instructors Workshop at Rough River State Park December 10 - 12.

Bruce Lawler will serve as an associate instructor this year.

These instructors will work very hard preparing for classes in addition to long class hours they will cover

during January. Students, please do your part, too.

- Before class, read the texts, work the exercises and problems.
- Show up for class on time.
- Show your gratitude to the instructors.

Integrated (E-File) Class Schedule for January 2008

| <u>Date</u> | <u>Days</u> | <u>Time</u> | <u>Class</u> |
|-------------|-------------|-------------|--------------|
| Jan 8 - 11 | T - F | 9 - 4 | ERO |
| Jan 14 - 15 | M - T | 9 - 4 | Senior I |
| Jan 15 - 17 | T - Th | 9 - 4 | Beginner |
| Jan 16 - 18 | W - F | 9 - 4 | Intermediate |
| Jan 21 - 22 | M - T | 9 - 4 | Senior II |
| Jan 23 - 24 | W - Th | 9 - 4 | Senior III |
| Jan 12 & 19 | S | 9 - 4 | Self-Study |

All classes are at the AARP Office.

Students will received notice of class assignment by December 18.

Paper Class Schedule for January 2008

| <u>Date</u> | <u>Days</u> | <u>Time</u> | <u>Class</u> | <u>Location</u> |
|-------------|-------------|-------------|--------------|--|
| Jan 7 - 11 | M - F | 9 - 4 | Beginner I | Salem United Church of Christ 3408 Newburg Road |
| Jan 21 - 25 | M - F | 9 - 4 | Beginner II | Buechel Fire Department 4101 Bardstown Road |
| Jan 16 - 17 | W - Th | 9 - 1 | Senior | Douglass Boulevard Christian Church 2005 Douglass Boulevard |

Please note: Two classes are tentatively scheduled for new volunteer tax counselors, however, depending of the number of students, only one of the two above classes may be offered.

Students will receive notice of class assignment by December 18.

Client Facilitator Class Schedule for January 2008

| <u>Date</u> | <u>Days</u> | <u>Time</u> | <u>Class</u> |
|-------------|-------------|-------------|-----------------------|
| Jan 28 | M | 9 - 12 | Client Facilitator I |
| Jan 28 | M | 1 - 4 | Client Facilitator II |

Both classes are at the AARP Office.

Students will receive notice of class assignment by December 18.

A couple of client facilitators are needed to assist in the preparation of CF notebooks. If interested, please contact Julia.

Use our website!

Newsletters are available online at our website: www.aarp-tax-aide-lou.org. You can print the newsletters and if you have a color printer, you'll get a full color copy.

Check out the website at least once a month.

New Tax Law for 2007 Returns

Home Mortgage Insurance Premiums are deductible as interest on Schedule A. Detailed information will be provided at January classes.

January Holidays

Please note: We only have 3 weeks in January to train over 175 students, therefore some classes are scheduled for Monday, January 21.

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

The next newsletter will be January 2008. As we approach the time of year when we most give thanks and express affection, we graciously thank all volunteers and supporters. You are the best. Have safe and joyous holidays. See you in 2008.

Dick & Julia

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

Volunteering Is A Commitment

When we volunteer, we are making a commitment and others depend upon each of us. In the past, we have talked about 40 hours, then 50 hours, and now, it really amounts to more like 60 hours.

If your site is open twice a week in February and once a week each of the following six or seven weeks, and we arrive at least 15 minutes before opening time, it adds up very quickly. And of course, invariably, we wind up staying over a few minutes after closing time. Most of us try to help with the setup and again stay

to help with the removal and storage of the equipment.

If you cannot fulfill your scheduled work period, it helps when you can trade with someone from another site or another day to be sure your slot is filled and the site isn't short handed. Others really depend on you to be present.

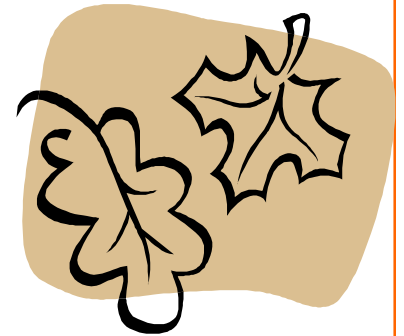
Many thanks to the numerous volunteers who willingly help out with an extra site, some of the special sites or do double duty at their home site. Thanks too for those who travel the extra distance

regularly to be sure that each site is fully staffed.

Our taxpayers depend upon us for friendly, helpful and accurate service. Thanks for volunteering and accepting the responsibility of being on time and making the extra effort to fulfill your commitment – it is sincerely appreciated.

Website and Newsletter

A Local Coordinator in Virginia e-mailed us recently about our website and our newsletters he read online. He added :



"P. S. Your newsletter is well done & material you cover is both relevant and informative. Good job." *News' N' Notes* is for volunteers. Your input and suggestions are most welcome. Let us hear from you.