



# Tax-Aide News' N' Notes

AARP TAX-AIDE



## 10,300 TAX RETURNS PREPARED 14,300 HOURS DONATED

It was another banner year for local Tax-Aide volunteers. Each year volunteers continue to prepare more tax returns and provide added assistance to our community.

For 2007, 5,800 federal and 4,500 state returns were prepared. Volunteers assisted 9,000 taxpayers by answering questions, counseling and preparing returns. To do this community service, volunteers donated 14,300 hours from

February 1 to April 15. These hours do not include the many hours of site pre-opening work that starts in July and goes through January.

Statistics in all categories increased: returns prepared up 4%, quality review up 6%, electronic filing up 29% and donated hours up 3%.

Electronic filing is now at 80% which is the IRS goal.

The telephone tax re-

fund returns, 1040EZ-T, were fewer than expected at 147 forms, however, many 1040s were filed only to claim the telephone tax refund

Volunteers are congratulated on this fine year. Special thanks to Local Coordinators who supervised 20 sites, the Electronic Return Originators who transmitted 8,500 returns and the Instructors who taught 150 volunteers.

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### Help Recruit Volunteers:

- Ask your neighbors, friends, relatives
- Put banners on your church bulletin boards and in newsletters
- Ask other retirees to donate their time.

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## Personnel Updates

Personnel Updates are included in this mailing. **Please complete and respond quickly.** It is very important for planning January classes, ordering mate-

rial (which is now ongoing) and for site preparation. Be sure to include any new information or changes: postal address, e-mail address and telephone num-

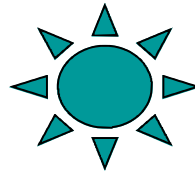
bers. Also, please consider stepping up and helping more by volunteering for site management, electronic transmitting or instructing.



## LC & ERO Needed for Proposed Site Kentuckian Heads AARP Foundation Board

A new Tax-Aide site in Shepherdsville is being considered. There are several trained counselors who live in the area and with the addition of a Local Coordinator and an Electronic Returns Originator, the site will open. If you are interested in either position or in both positions, please contact Julia. The two other Bullitt County sites at Hillview

and Mount Washington will open as usual.



Nelda Barnett, Chair, Board of Directors, AARP Foundation, lives in Owensboro



## LC & ERO Positions Available

There are several vacancies in the local coordinator and electronic returns originator positions. It is urgent that these positions be filled.

Intern positions are also available. Interns serve as associate to LCs and EROs.

All Tax-Aide appointments for

local coordinators, electronic returns originators, instructors and district coordinators are for a one year period.

If you are interested in either of these, contact Dick or Julia or note such on the Personnel Update.

*State Tax-Aide Coordinator Elmer Olson is looking for a webmaster to set up and maintain a Kentucky State AARP Tax-Aide web site. If you are interested, contact Elmer at [elmerrolson@yahoo.com](mailto:elmerrolson@yahoo.com).*

## Laptops - Donations

Slightly used laptops are needed - are you replacing yours? Minimum specifications for TaxWise are 6 Gig hard drive, 128 meg memory and an operating speed of at least 400 MHz. If you have one to donate that meets this minimum criteria (more is better), please call Dick.



## We've Moved

Call us at **394-3443** - the telephone number is still the same but our office has moved across the hall from Suite 121. The answering machine is checked daily during the tax season and several times weekly during the off season.





## Jean Ledington - Online Counselor & Quality Reviewer

Jean Ledington has been a Tax-Aide Online Counselor/Reviewer for five years, in addition to her other duties as class instructor and counselor at the Salem site.

Taxpayers can go to the AARP web site line and e-mail federal tax questions. Online Counselors (OLC) answer these questions which are then checked by a

Quality Reviewer (QR).

To qualify for OLC, pass the IRS counselor test each year. To be a QR, the counselor must also be an instructor.

During 2006, 7,214 questions were e-mailed to AARP. Jean reviewed 958 of those answers, which took about 1 - 2 hours daily during the tax season.



## Tax-Aide Calendar

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

**November 12, LC Meeting, 9:30**

**December 10 - 12, Instructor's State Workshop, Rough River State Park**

**February 1, 2008, Sites Open**

**April 15, 2008, Last Day Sites are**

**Open**

**April 21, 2008, Wrap-up Meetings for LCs & EROs**

**April 21, 2008, noon, Thank You Luncheon for LCs, EROs & Instructors**

This calendar may change, so check the October Notes or our website for updates/changes.

**Local Coordinators:**

It's time to check on the availability of your site for 2008. Please verify that your site can be used by Tax-Aide, confirm the day(s) and hours, then report to your District Coordinator.

## 3 New Volunteer Orientations Scheduled

Recruiting for volunteers is ongoing and three new prospect orientations have been announced for this fall. These one to two hour sessions will acquaint potential new volunteers with our Tax-Aide program. Invite those who show an interest to attend any one of these:

**Wednesday, September 26, 1:30**

**Friday, October 19, 10:00**

**Tuesday, November 13, 1:30**

All sessions are at the AARP Office, Suite 121. It is requested that new prospects call 394-3443 to register for these sessions.





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**Julia Carey**

People Helping People



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

*Newsletters are available (in color) online at our web site: [www.aarp-tax-aide-lou.org](http://www.aarp-tax-aide-lou.org). Also, at the web site is an application for new volunteers, a calendar of events and more information. If you haven't checked it recently, go online and see what's new.*

*If you know folks who are interested in volunteering, please give them our web address, encourage them to check it out and complete an application, or just ask them to call either Dick or Julia. Remember, current volunteers are our best recruiters.*



Needed - Instructors for January Classes

The framework for January classes is well underway. Classroom instructors are needed. As we grow with more volunteers, more instructors are required for additional classes. Last season, there were 150 volunteers, all of whom required tax instruction in January. This year it is



expected that volunteers will number 175 or higher, so the need for instructors is greater.

All instructors meet in November to start class preparation. There is a three day workshop in December (mileage, food & lodging provided by Tax-Aide). Following the workshop, class assignments are made.

Team teaching is used with 4 to 5 instructors and a lead instructor for each class.

Instructors for both paper and electronic classes are wanted. Electronic instructors should have a strong working knowledge of TaxWise, the IRS provided software.

Please show your interest by checking the Personnel Update, or call either Dick or Julia if you have concerns or questions.

