

# TAX-AIDE NEWS ' N' NOTES



Volume 8, Issue 2

September 2008

## GREATER LOUISVILLE AREA TAX-AIDE

### Davis, Gray, Huber and Ouzts Named Local Coordinators

**Jerrye Davis, Monty Gray, George Huber and Bill Ouzts** have been appointed as Local Coordinators (LC) for the 2008 tax year season.

Jerrye will manage the Urban Government site on Barrett Ave and also serve as the Electronic Return Originator (ERO). Her husband Bernard is also a Tax-Aide volunteer.

Monty Gray, retired from the KY Dept of Revenue, and a two year volunteer with Tax-Aide will oversee the Shively site, replacing Al Eisert, newly appointed District Coordinator, who will continue as ERO for Shively.

George Huber joins the leadership team as the new LC at

Oldam County. His wife Charlotte is also an active TA volunteer and Client Facilitator.

Bill Ouzts moves to the Sts. Mary & Elizabeth Hospital site becoming the new LC. Bill has volunteered at the Urban Government and Shively sites in recent years.

#### **McKinney, Rudloff and Rusinek Become New Shift Co-ordinators**

AARP Tax-Aide has created a new title, **Shift Coordinator**, for those formerly called Associate Local Coordinators.

Jim McKinney and Roman Rusinek will serve at Lyndon and Wayne Rudloff at Salem now.

#### **POSITION TITLE CHANGES**

AARP Tax-Aide has announced several new positions and title changes.

Associate LC's become **Shift Coordinators (SCO)**—see left.

District Coordinators may now have an **Administration Coordinator (AC)** to assist with records and office administration.

DC's can also name a TRC, **Training Coordinator** to oversee Classes and Instructors. This role is currently handled by Al Eisert for Paper classes and Dick Trowbridge for Electronic classes.

See page 2 for more changes.

### Computer System Requirements Increased

A recent CyberTax memo announced that the system requirements for using the TaxWise (TW) software program have been increased.

Effective immediately, processors must operate at a minimum

of 266 MHz but the minimum recommendation is now 400 MHz or faster.

Minimum memory has been increased to 256 MG although 512 MB is recommended and 1 GB is the optimum for quick service.

Hard drives need at least 1 GB of empty space after all operating and program software is loaded. Preferred size is at least 10 GB.

Units smaller than the above may run but performance will suffer and delay processing.

The preferred operating system is Windows XP Pro although some units with Windows 2000 with SP4 may be able to handle TW. Windows Vista will also work although no IRS or Tax-Aide units will be using it.

All cpu's with TW are required to be encrypted and are wiped clean at the end of the season—individual records are forwarded to the IRS and none are retained after the tax season.

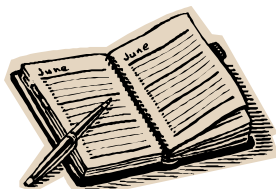
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## IMPORTANT DATES

- Sept 5– Personnel updates due
- Sept 15 –Est Taxes Due
- Sept 24—Wed, 1:30 pm  
New Volunteer Orientation
- Oct 10—Site data due
- Oct 17– Fri, 9:30 am  
New LC,SC Orientation
- Oct 17—Fri, 1:30 pm  
New ERO Orientation
- Oct 24– Fri, 10:00 am  
New Volunteer Orientation

**AARP Tax-Aide originated to serve those age 60 and over with low and medium income**



**Check the website for last minute changes and updates.**

## AARP Tax-Aide Announces Structure Changes

The Volunteer Organizational Structure now has a number of changes, particularly at the Site and District levels.

Sites now have seven positions, headed by the Local Coordinator. In addition to the former roles of ERO, E-Counselor, Counselor and Client Facilitator, the new roles of Non-Counselor and Shift Coordinator have been added.

Districts have added an Administrative Coordinator and a Training Coordinator to the continuing roles of Technology Coord, Communications Coord, Prospective Volunteer Coord, Instructor, and District Coordinator.

In Louisville, our DC's and other volunteers will cover the responsibilities required but not necessarily in separately titled positions.

### More DC's Named

**Elmer Olson**, KY State Tax-Aide Coordinator has announced the naming of several additional District Coordinators.

Northern KY will be led by **Richard Wolf**, **Hanna Twyla** will cover the Elizabethtown area and **Kathlyn Stearns** will be responsible for the Corbin area. **Al Eisert** was named for part of Louisville and Bullitt County.

## More Thoughts for your Personal Tax Planning

Since most of our volunteers are seniors—or nearing so, keeping up with some of the opportunities for preferred tax treatment is worth reviewing.

### HOMESTEAD EXEMPTION

KY residents and property owners 65 or older may get a homestead exemption. Those qualifying may subtract \$31,400 from the assessed valuation

and then have a lower property tax bill.

Contact the county property valuation administrator or the KY Finance and Administration Cabinet.

### POSSIBLE FEDERAL TAX EXEMPTION TOO

Details are incomplete at this point but a new additional exemption may be

coming for homeowners who do not itemize and claim the standard deduction on the federal tax form. Married couples may be able to claim up to \$1000 of their state and local property taxes in 2008. Singles may be able to claim up to \$500.

Watch for more details when all the 2008 changes are announced.

*Being older isn't all bad!*

## Web site now includes Southern IN District

The southern Indiana AARP Tax-Aide District sites are now featured on the [www.aarp-tax-aide-lou.org](http://www.aarp-tax-aide-lou.org) web site.

The Indiana District and the two Louisville Districts will be collaborating on a variety of promotional and recruiting efforts.

**Jack Stuart** is the District Coordinator for So IN.

In addition, both groups will share the 502-394-3443 phone number as well as the e-mail address [LOUTAX-AIDE@insightbb.com](mailto:LOUTAX-AIDE@insightbb.com).

Indiana Sites are expected to include the following locations:

Charlestown Library  
Clarksville Library

Corydon Hillview Apts  
Henryville Library  
New Albany Am Leg Post  
Salem Public Library  
Salem Senior Center  
Sellersburg Library  
We're pleased to welcome our new IN friends.

## Planning for 2008 Tax Season started in April!

Leaders gathered in April to begin planning for the 2008 tax season.

LC's, TC's, ERO's, and Instructors reviewed the 2007 season and evaluated the steps needed for 2008.

Recommendations were developed and forwarded to the appropriate National, Regional, State and local levels.

The DC's started the next steps in July.



*My goodness, it feels like we just finished the 2007 returns—is it time to start planning for 2008 already?*

## Electronic Filing Records Provide Interesting Profiles

Many of our volunteers remember doing tax returns using a pencil and carbon paper—what a mess when a mistake needed to be corrected on the carbon copy!

Copiers and Computers have changed the entire process. During the past season, about 86% of the returns were e-filed. The former Bashford Manor (now Salem) and Mt Washington sites were our first e-filers.

E-filing is now available at all of

our sites but we still encourage new volunteers to do paper the first year to reinforce their knowledge and understanding of tax law.

Here are some of stats from the 2007 e-file reports:

**Filing Status:**

Single	62.9%
Joint	32.2%
Other	4.9%

**Schedules Used:**

A	21.2 %
B	24.5 %
CEZ	5.1 %
D	13.1 %
EIC	5.4 %

About 74% of those filing federal returns also filed a state return.

All e-filed returns use Fed Form 1040.

## Mileage Rates Changed at Mid-Year

Two of the three mileage rates used for tax purposes changed on July 1.

Taxpayers will need to keep accurate records to be able to use these for their 2008 tax return.

Both the business and medical/moving rates increased but the statute for charity stayed the same.

PURPOSE	1/1/08-6/30/08	7/1/08-12/31/08
Business	50.5 cents	58.5 cents
Medical/Moving	19 cents	27 cents
Charitable	14 cents	14 cents





**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**

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**CHECK OUT  
 THE INTERIM  
 UPDATES &  
 NEWS REPORTS  
 AT**

**[www.aarp-tax-aide-lou.org](http://www.aarp-tax-aide-lou.org)  
 (Usually posted twice a month)**

**SITE LEADERS (LC's)**

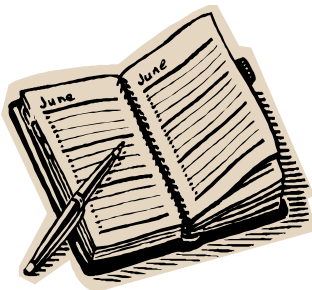
CGC Carol Easley  
 CLIFTON Barbara Malone  
 EGC Bill Kugler  
 HILLVIEW Bill Schook  
 IROQUOIS Bill Jasper  
 JTOWN Bill Long  
 LYNDON Roger Crum  
 MT WASH Mary Thompson  
 OLDHAM George Huber  
 PORTLAND J B Hitt  
 SALEM Jim Miller  
 SHELBY Marvin Rogers  
 SHIVELY Monty Gray

SPEC SITES Bob Pessolano  
 ST MATT John Emmerich  
 STS M&E Bill Ouzts  
 SWGC Sherron Bell  
 UGC Jerrye Davis

Serving as a Local Coordinator takes a lot of additional time and effort and each of the above has demonstrated their commitment and skill in a variety of other positions too.

**Thank You  
 For a Job  
 Well Done!!**

**New Volunteer Information/Orientation Meetings Start**



Invite a friend or associate to come to one of the scheduled orientations.

Three options are available for new volunteers to learn about Tax-Aide this fall. Each session will highlight typical activities for the various volunteer positions and sample materials will be distributed to those wishing to be a counselor.

Both morning and afternoon sessions will last about an hour and a half so potential volunteers can select the one that best fits their schedule.

Options are  
 Sept 24 Wed 1:30 PM  
 Oct 24 Fri 10:00 AM  
 Nov 10 Mon 1:30 PM  
 Advance reservations are pre-

ferred to insure that adequate materials are available.

**HELP NEEDED**

The next task is to insure we have a large group of new volunteers and the best recruiters are those that are currently helping.

Be sure to invite your friends and associates to join our crew of dedicated folks.

It's a great short-term job that only takes a few hours each week from Feb 1—Apr 15.

More information is available on the web site and interested persons can also register there, or by phone or e-mail.