

TAX-AIDE NEWS ' N' NOTES



Volume 9, Issue 2

September 2009

GREATER LOUISVILLE AREA TAX-AIDE

Technical Coordinators and Instructors Named

District Coordinators, **Al Eisert** and **Dick Trowbridge** have appointed the Technical Coordinators and Instructors for Tax Year 2009.

Trowbridge will continue as the Senior Tech for 2009 and will be joined by Eisert, **Larry Curtis, John Emmerich, Bill Long and Bob Lukes**. Additional persons will be added at a later date.

In addition to preparing the equipment and software for the new season, each TC will be related to several sites to provide quick service as needed.

Paper Classes

Two teams of instructors will be teaching the classes this year.

Eisert will oversee the paper classes for counselors. Instructors in this group will include **Jim McKinney, Dan Dues, Martha Dues, Carol Easley** and others yet too be named. As in the past, several levels of classes will be available in January.

E-classes

E-classes will be under the oversight of Trowbridge. Joining the staff are **Sarah Abraham, Eisert, John Emmerich, Bill Kugler, Bill Long, Bob Lukes, and Dave Nuermberger**. Others and interns will be added.

Three levels of classes will be offered, in addition to the ERO class and Self-Study.

CF Classes

Two or three options will be available for Client Facilitators and Screeners. Training will also be added for Office Volunteers, a new group added this year.

Orientation

Orientation sessions will be held for new volunteers during Sept, Oct and Nov.

New Local Coordinators, Shift Coordinators and Electronic Return Originators will likewise have special sessions this fall in preparation for their new leadership roles.

Specific dates will be announced later this fall.

New Spec's Announced for TaxWise Software

Recommended spec's for TaxWise for tax year 2009 have been announced which will once again stretch our resources since several of our units will need to be replaced – somehow? Many of the desktops will require more

memory and also larger hard-drives. The new requirements feature the following:

Pentium III or higher processor; Windows XP Pro with service pack 3; 256 MB of RAM (a full Gig is preferred); 1 GB available

additional space per tax year installed; 32 speed or higher CD-ROM; 2-4 USB ports; Super VGA 1024x768 high color 16 BIT display; File backup system; 56K Modem connection or Internet access if transmitting; PCL6 compatible printer; Internet Explorer 7.0 with latest sp or higher, Ethernet network card (if networked); and Adobe Reader 8.1 or higher. CCH does not guarantee performance on anything less than the above.

Units running TWO (TaxWise On Line) also require communications speeds of at least 800 kilobytes per second.

Hard drives must also be encrypted to protect all data.

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AARP Tax-Aide has over 32,000 volunteers serving at over 7,000 sites across the United States. It is the largest volunteer tax service in the USA.

New Items Now In-Scope for Tax Year 2009

As changes continue to be made in the tax laws, the scope of items handled by AARP Tax-Aide continue to grow. Some of the additions for 2009 include the following:

1099 HSA—for Health Savings Accounts

Rollover of traditional IRA's to Roth IRA's.

1099 LTC—Long term care distributions

Schedule M—handling

Economic Stimulus payment under ARRA

Schedule E to report rental and royalty income, oil leases and similar income only items, et.al.

Form 8606—for non-deductible IRA contributions

Form 8283—for non-cash contributions over \$500 but less than \$5,000.

Others are also under consideration too.

Details will be covered in the study materials and discussed in the various classes.

It is essential for all counselors to carefully study these new areas prior to attending the classes in January.

A number of other items have been extended or modified for tax year 2009. Examples include energy credits for home improvements and new appliances.

Are You Planning for you personal return?

"The nice thing about being senile is You can hide your own Easter eggs."

The American Recovery & Reinvestment Act of 2009 has a number of items of interest.

The **Homebuyer credit** has two elements, one for those purchased Apr 9-Dec 31,2008 involves a repayment of the \$7,500 over a 15 year period.

The second relates to the \$8,000 for purchases from Jan 1-Nov 30, 2009.

A deduction of the sales and local taxes, and excise taxes for **new car purchases** of the first \$49,500 on purchases after Feb. 17, 2009.

Increased credits for EITC and ACTC.

Hope education credit now goes for 4 years, up from 2 years earlier.

The **first \$2,400 of unemployment** is now ex-

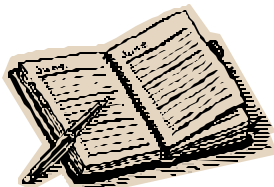
empt from income tax.

An enlarged list of **energy credits** are now available and are expected to be changed further by year end.

Details of these changes will be in the study material and can also be found at www.irs.gov.

Watch for more to come on these and other matters yet this year.

TA, IRS, VITA, TCE, TWO, TW, et al ?



Check the website for last minute changes and updates.

All of the above are somewhat familiar but we tend to use them frequently and they sometime confuse others.

TA, Tax-Aide, is the free income tax preparation program of the AARP Foundation and has been in operation for over 40 years.

IRS, the Internal Reve-

nue Service is likely one of the most recognized organizations in the United States.

TCE, Tax Counseling for the Elderly, and **VITA, Volunteers In Tax Assistance** are both free income tax preparation services sponsored by the IRS.

Tax-Aide is the largest

provider of free services in the TCE program and helps millions with their tax returns each year.

Over 32,000 volunteer their time and talent at some 7,000 different sites.

TW, TaxWise is the software program used, as is **TWO, an online version.**

Planning Ahead

September

LC's & ERO's selected

23 - 10:00 am Instructors Orientation & Organization

23—1:30 pm New Volunteer Information and Orientation

October

Interns Identified

19 - 9:30 am Orientation

For new SC's and LC's
19 - 1:30 pm Orientation for new ERO's

23 - 10:00 am New Volunteer Orientation

26-27 DC Meeting

30 - 9:15 am Instructors and TC meeting

November

Instructors Meetings

New E-Filer Orientation

LC & SC Meeting

December

Class Assignments

Instructor Training

ERO Mtg—Dec 16

Please pencil in the events that include you now. Details will follow later.

"Specifics and confirmation will be sent directly to those involved"

Recent Donors...and more gifts welcome—Laptops???

Recent donors include the following: **John Emmerich, Jim McKinney, Dave Nuernberger, Dick & Murt Trowbridge and Delores Wathen.**

Laptops continue at the top of the "needs" list since they can more easily be transported from site to site or stored easily in limited storage space.

Desktops are also welcome so if you or an acquaintance are replacing your old computer, keep Tax-Aide in mind—it's

deductible!!! Flat screen monitors are also appreciated.

Companies find it necessary to replace their computers on a regular basis so if you have a contact—suggest AARP Tax-Aide. This is a 501 (c) 3 organization.

Funding and support for the Tax-Aide program comes primarily from the AARP Foundation and the Internal Revenue Service. Individual and Corporate gifts are also always welcome.

The greatest gift is provided by volunteers with your time and effort.

Thank You



Celebrating Our Birthdays

Another year older? Or perhaps really another year of experience. Happy *belated* Birthday to the following in **August**: (Sorry our records missed these:

10—Ian Schill

29—Charles Will

....and now in **September**

4—George Mefford

7-Bill Giles & Edith Pope

8-Carol Somplatsky-Jarman

10-Monty Gray

11-Evelyn Cooper

13-Dan Dues

15- Bill Schook

16- Gerry Snyder

And we need dates for many others too—let us know please.

There will be at least 20 in October!!!!

Congratulations—and thanks for providing another year of service to the AARP Foundation Tax-Aide program. Your experience counts with us.

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**AARP
Tax-Aide**
**Is the largest group
of volunteers in the
IRS (TCE)**
**Tax Counseling for
the Elderly with over
32,000 volunteers**

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 "Newsletters" tab at www.aarp-tax-aid-lou.org.

District Coordinators Al Eisert and Dick Trowbridge

LC & ERO APPOINTMENTS COMING SOON

District Coordinators are in the process of confirming the annual appointments and selection of Local Coordinators and Electronic Return Originators.

These positions are one year agreements and occupants are also eligible for other positions in the organization. Both positions are held by the same person at many of the sites.

There are several vacancies in each district so contact either of the DC's if you are interested in these roles or that of an intern in training for future appointment.

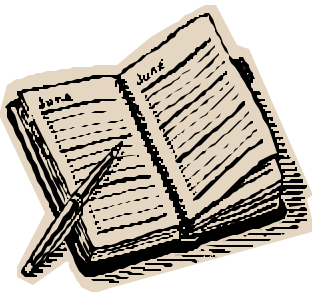
Orientation will be in October.

TaxWise on Line (TWO)

Several sites across the USA tested a new on-line version of TaxWise last season and are recommending it highly.

Local use has been deferred until next year since it requires advance planning and the availability of a broad band connection at the site.

If conditions permit, a pilot program may be implemented in preparation for multi-site use next year.

New Volunteer Information/Orientation Start Sept 23

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 23 Wed 1:30 PM

Oct 23 Fri 10:00 AM

Nov 10 Tues 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.