

NEWS & VIEWS

CHAPTER 044



VOLUMN X, ISSUE I – JAN.-FEB., 2021

AARP TAX-AIDE PROGRAM

By David Patterson
Tax Counselor



The AARP Tax-Aide program began in 1968, with four people in Florida filling out tax returns by hand, using paper forms with carbon paper (you remember carbon paper don't you?). It's a good thing the tax laws were a lot simpler back then. Since I'm a numbers-person, I will tell you about the 2019, tax season (the 2020, season didn't work out so well). Over 35,000 volunteers at 5,000 locations throughout the country processed 1.611 million returns resulting in \$1.42 Billion in total tax refunds, done at no cost to our clients (we are not allowed to accept tips, but baked goods are always welcome). FYI—*H & R Block's* fees start at around \$150 for a simple return.

See TAX-AIDECont. on P-2

Past-President's Report—Hi everyone Sandie and I have missed you. We were unable to attend the last luncheon meeting held by Chapter 044 at *Golden Corral* in Ontario, on February 12, 2020. So, it has been over one year since we have personally connected. We have just learned that the purple tier is being restored for outdoor dining in our area. We have hopes now that we can do that for the upcoming April meeting.



Sandie and I have been trying to stick with our usual daily routines. I have continued to do volunteer work with the *Military Reserve* and otherwise stay home and

CalPERS Fund Market Value, 12/30/20, 441.15 Billion; 01/25/21 449.03 Billion

See PAST-PRESIDENTCont. on P-4

President's Report – Shirley Wofford



Hello friends—Happy New Year! I personally was glad to leave 2020, in the rear-view mirror. I hope we will see better roads ahead in 2021. So far, things still look pretty rocky. I want to forge on and drive carefully!

We had been looking forward to seeing some of you at the outdoor holiday party on December 09—the State pulled the plug on December 06. I want to express my appreciation to the 21 members who contacted me. Fifteen members confirmed they would attend and five others were tentative. The cancelation also halted our planned Community Service project to collect personal toiletry items for donating to *Foothill Family Shelter of Upland*. Member Elaine Jeffers had her donation ordered and delivered to me. I combined that donation with two others I had received and delivered such to the *Shelter*, on behalf of Chapter 044, Jan. 13, 2021. If and when we are able to have a future meeting, we will finish that project and have some extra raffle drawings—it will be a belated holiday party.

I wish for all the members and their loved ones and friends to stay well and safe. To anyone who has had to battle *Covid 19* head-on: My heart and wishes for complete recovery go out to you.

(See pages 3 and 4 for meeting updates)

IRS Rules for the RMD in 2021—If you are age 70 or over, use the IRS chart below to calculate the amount you must withdraw from your traditional IRA, 457, or other 401K-type accounts this year. (The SECURE ACT adopted in 2019, allows you to wait until age 72 to begin taking RMD's if you reached the age of 70 ½ after Dec. 31, 2019.) Divide the balance on your 12/31/20, statement by the numbers in the column that correspond with the age you will be on your birthday this year. (Don't use this table if your spouse is your sole beneficiary and is more than 10 years younger than you.)

Age	Distribution Period (yrs.)	Age	Distribution Period (yrs.)
70	27.4	93	9.6
71	26.5	94	9.1
72	25.6	95	8.6
73	24.7	96	8.1
74	23.8	97	7.6
75	22.9	98	7.1
76	22.0	99	6.7
77	21.2	100	6.3
78	20.3	101	5.9
79	19.5	102	5.5
80	18.7	103	5.2
81	17.9	104	4.9
82	17.1	105	4.5

TAX-AIDE.....Cont. from P-1

We can do Federal and State personal tax returns for most people. You do not have to be a member of AARP, a senior citizen or low-income, though we do encourage high-income earners (over \$100K) to go elsewhere, so we can help more low-income people. The most common reasons we cannot do a return is for rental income, home office deductions, small business with inventory or complex brokerage statements.

My District covers the southwest corner of San Bernardino County. In a normal year, you would find us in nine locations from Chino Hills, up to Rancho Cucamonga, and over to Fontana. I'm sorry to say, only four locations will be open this year—the *Carolyn Owens Center* in Chino (909-334-3271); the *Montclair Senior Center* (909-625-9462); the *George Gibson Senior Center* in Upland (909-981-4501); the *Rancho Cucamonga Senior Center* at Central Park (909-764-8025). There is a chance the *Ontario Senior Center* and the *Upland Library* will open for *Tax Aide* later in the year. All depends on what happens during the pandemic.

FREE TAX PREPARATION
VOLUNTEER
TO THE CORE

Use the numbers listed above to schedule an appointment with a *Tax-Aide* volunteer. For any other information, leave a message at 605-549-5168.

Usually, I would be trying to recruit you to volunteer with us. If you can use a computer, do simple math and like to talk with people, you have the qualifications to join our program. During training, you would learn basic tax law and how to complete a tax return. However, this year, we had to suspend training for new counselors—well, there is always next year. If you would like to volunteer, go to www.aarp.org click on "Volunteer".

I hope all is well with you and your family and everyone stays healthy,

David Patterson

IRS Rules for the RMD in 2021.....Cont.

Age	Distribution Period (yrs.)	Age	Distribution Period (yrs.)
83	16.3	106	4.2
84	15.5	107	3.9
85	14.8	108	3.7
86	14.1	109	3.4
87	13.4	110	3.1
88	12.7	111	2.9
89	12.0	112	2.6
90	11.4	113	2.4
91	10.8	114	2.1
92	10.2	115+	1.9

CHAPTER 044 OFFICERS

President	Shirley Wofford	(909)986-3160
Vice-Pres.	Alice Alexandre	(909)622-7937
Secretary	Violeta Comia	(909)636-3134
Treasurer	Shirley Wofford	(909)986-3160
Past-Pres.	Robert L. Seigler	(951)769-4901

COMMITTEE CHAIRPERSONS

Hospitality	Martha Borunda-Newman	(909)971-3635
Legislation	Robert L. Seigler	(951)769-4901
Membership	Steven A. Lacey	(909)980-0185
Program	Sandie Seigler	(951)769-4901
Sunshine	Alice Alexandre	(909)225-2601
Telephone Tree/ Publicity	Steven A. Lacey	(909)980-0185

Newsletter Editor

Shirley Wofford - shirlwof@hotmail.com

RPEA Area V Director

Ellie Knapp - (661)607-2072

knapp.ellen@yahoo.com

RPEA Assistant Area V Director

Robert "Bob" Seigler - (951)769-4901

RPEA HEADQUARTERS - 1-800-443-7732

Change of Address: Please be sure to notify RPEA Headquarters of such change

TREASURER'S REPORT--

Chapter 044's funding balance on December 31, 2020, was **\$14,566.64**



IN MEMORIAM

James Jones
Edna Nivero

Thayer, MO
Fontana

Those we hold most dear never truly leave us--they live on in the kindnesses they showed, the comfort they shared and the love they brought into our lives.
--Isabel Norton



--George Washington

"I hope I shall possess firmness and virtue enough to maintain what I consider the most enviable of all titles--the character of an honest man."

PRESIDENTS' DAY, FEBRUARY 15, 2021

Chapter 044 Meetings, 2021

2nd Wed. of Even Months -

-----No meeting on Tuesday, February 10, 2021-----

We will continue to list the scheduled meetings, but specific details for each might be tentative due to Covid 19 restrictions prevailing at the time. Also, the lunch-fee schedule will continue to be listed as follows:

(Lunch-Fee Schedule for Chapter 044 meetings, 2021)

Member of Chapter #044	Free
RPEA Member	\$4.00
Non-member of RPEA	\$8.00
Prospective Member of RPEA (maximum two times)	\$4.00
Chapter Guest	Free



Meeting Dates and Guest Presenters

February 10, 2021 - David Patterson, Tax Counselor for AARP Tax-Aide Program.

April 14, 2021 - (Outdoor meeting possible--Guest TBD)

June 09, 2021 - TBD

August 11, 2021 - Henry Jones, CalPERS BOA, retired employees' representative

October 13, 2021 - TBD

December 08, 2021 - Henry Jones (Holiday Party)

A WARM WELCOME TO THESE NEW MEMBERS OF CHAPTER 044

Arlene Alderete	Rancho Cucamonga
Michael Lambeth	Ontario
Kenneth Manning	Rancho Cucamonga
Albert Young	Eastvale



Annual Community Service Project Postponed--

Chapter 044's fifth, Annual Community Service



Project that was to take place in conjunction with the Holiday Party scheduled on

December 09, 2020, was postponed due to pandemic restrictions requiring cancelation of the Party. Chapter 044 will conduct the project at its next in-person meeting—date and time TBD.



"I don't know who my grandfather was; I am much more concerned to know what his grandson will be."
--Abraham Lincoln



NEWS & VIEWS

POMONA VALLEY 044

S. Wofford
5640 Palo Verde St.
Montclair, CA 91763



PAST-PRESIDENT.....Cont. from P-1

follow the recommend guidelines for keeping away from the virus. Sandie has been busy with family members participating in the care of her mother.

According to the most recent edition of the RPEA magazine, more changes have occurred with the makeup of the BOA. Bill Wallace resigned recently as *Director of Membership*. A former CalPERS Board Member, Michael Flaherman, was appointed by the BOA to fill that position. *Director of Public Relations* Lorenzo Rios resigned that position and the President of the West Covina, RPEA Chapter 90, was appointed by the BOA to take over that position. I look forward to seeing the now complete RPEA, BOA roster. working together again on our retirement issues.

Stay well and safe,

--Bob Seigler

Happy Valentine's Day

Future Chapter 044 Luncheon Meetings

We have just learned that the State is going to restore the color-tier system. San Bernardino County would be in the purple tier which allows outdoor dining. It is too late to regroup for the February 10, 2021, meeting, but we hope to have an outdoor luncheon meeting on April 14, 2021. Please stay tuned--we will have further updated information in the next, newsletter. (It is unknown, at this time, whether or not *Golden Corral* will reopen when indoor dining is allowed again. Efforts to speak with GC management have not been successful.) Our best wishes are for all the members to stay well and safe and that we can meet together again soon.

