



# NEWS & VIEWS

## CHAPTER 044

VOLUMN XII, ISSUE I – JAN.-FEB., 2023

### DAVID PATTERSON, TAX COUNSELOR AARP TAX-AIDE PROGRAM

David Patterson is a *Tax Counselor* and *District Coordinator* for the AARP Foundation's Tax-Aide program, a free service offered during the tax-filing season every year, for senior citizens and moderate and low-income filers. His territory is the southwest portion of San Bernardino County with locations in Chino, Chino Hills, Fontana, Montclair, Ontario, Rancho Cucamonga, and Upland.



Mr. Patterson had a 40-year IT career that began after high school graduation when he joined the Navy as a *Data Processing Technician*. After that enlistment, he went to college, got his first programming job, and ultimately progressed to the position of *IT Manager* for a medical service bureau where he worked for 12 years.

**See TAX-AIDE .....Cont. on P-2**



**President's Report**—Hello, everyone—Welcome to 2023. I hope everyone was able to enjoy safe and healthy holidays with family and friends. I plan to visit all the chapters in Area V this year to talk with those, respective, RPEA members about how they are doing after three years into the pandemic that has affected all in differing ways. I have been participating in meetings of all of RPEA's Area Directors. We have been striving to determine what could be done to get members to return to regularly scheduled, in-person chapter meetings.

The Area Directors surveyed RPEA's, respective, Chapter officers to learn what types

**CalPERS Fund Market Value, 11/18/22, 443.48 Billion; 01/18/23, 456.40 Billion**

**See PRESIDENT..... Cont. on P-2**



## PRESIDENT.....Cont. from P-1



of activities they would want to pitch to their members. Some suggestions have been picnics, trips to casinos, movies, concerts, museums, and more.

Once we know what the members indicate they would like in the way of outings beyond the usual meetings, a list will be posted; I hope there will be something of interest for every member.

As usual, we are continuing to work on obtaining interesting guest speakers for the upcoming meetings. If you are interested in particular subjects, please call me. Also, please contact me if you would consider volunteering to serve on the Board.

I hope to see everyone at the Chapter 044 meeting on February 08, 2023.

Regards,

Steven Lacey

President/Area V Director



**IRS Rules for the RMD in 2023--**If you are age 73, 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. Divide the balance on your 12/31/22, statement by the numbers in the column that corresponds 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.)
73	26.5	93	10.1
74	25.5	94	9.5
75	24.6	95	8.9
76	23.7	96	8.4
77	22.9	97	7.8
78	22.0	98	7.3
79	21.1	99	6.8
80	20.2	100	6.4
81	19.4	101	6.0
82	18.5	102	5.6
83	17.7	103	5.2
84	16.8	104	4.9
85	16.0	105	4.6
86	15.2	106	4.3
87	14.4	107	4.1
88	13.7	108	3.9
89	12.9	109	3.7
90	12.2	110	3.5
91	11.5	111	3.4
92	10.8	112	3.3

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

He later became *IT Manager* for Athens Services, a solid-waste disposal company, and he was there for 21 years. Six months after retirement, he volunteered as a Tax Counselor for the *AARP Tax-Aide* program.



David says his IT background came in handy, for the *Tax-Aide* program, as it has undergone drastic technological changes during the past several years. He has been called upon to conduct workshops to help other volunteer leaders with the new technology and to help implement the new software and equipment needed.

After being canceled as scheduled guest-speaker for three meetings in 2020, and 2021, due to changing pandemic restrictions, Mr. Patterson provided updated *Tax-Aide* information and spoke about the need for volunteer Tax Counselors at our meetings in August and October, 2021. He was finally able to give a full guest-speaker presentation at our February 09, 2022, meeting.

Now, in 2023, we look forward to his presentation again as guest-speaker. He will provide updated information on the *Tax-Aide* program, providing tax preparation services primarily for low-income and senior filers.



Mr. Patterson will bring hand-out information, including addresses and phone numbers for the following sites that will be open during this tax-preparation season. He will also provide his Google voice number for messages and questions:

Tax Preparation Site	Days and Hours of Operation
Ontario Senior Center	Mon., 1:00-5:00 p.m.
Carolyn Owens Community Center (Chino)	Wed., 10:00 a.m.-2:00 p.m.
Gibson Senior Center (Upland)	Fri., 9:00 a.m.-2:00 p.m.
Rancho Cucamonga Community Center	Tues., 9:00 a.m.-2:00 p.m., Thurs., 1:00 p.m.-5:00 p.m.

Please attend to get your tax questions answered by Mr. Patterson and show him appreciation for his collaboration through four tax seasons.





## CHAPTER 044 OFFICERS

<b>President</b>	Steven A. Lacey	(909)210-2022
<b>Vice Pres.</b>	Alice Alexandre	(909)622-7937
<b>Secretary</b>	Violeta Comia	(909)636-3134
<b>Treasurer/ Past-President</b>	Shirley Wofford	(909)986-3160

## COMMITTEE CHAIRPERSONS

<b>Hospitality</b>	Martha B. Newman	(909)971-3635
<b>Legislative</b>	Shirley Wofford	(909)986-3160
<b>Membership/ Publicity</b>	Steven A. Lacey	(909)210-2022
<b>Program/ Telephone Tree</b>	Dorothy Lacey	(909)240-4171
<b>Sunshine</b>	Alice Alexandre	(909)622-7937

## Newsletter Editor

Shirley Wofford - [shirlwof@hotmail.com](mailto:shirlwof@hotmail.com)



## RPEA Area V Director

Steven A. Lacey - (909)210-2022

## RPEA HEADQUARTERS - 1-800-443-7732

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

## ASSOCIATION MEMBER BENEFITS & INSURANCE AGENCY (AMBIA)

Jack Danielson@amba.info  
(530) 864-3793

## TREASURER'S REPORT--

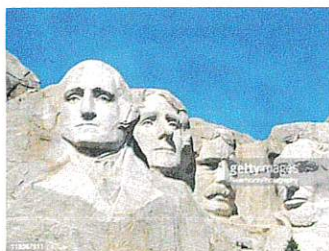
Chapter 044's bank balance on  
December 31, 2022, was **\$11,291.06**



## IN MEMORIAM

Delores Burris	Claremont
Helen Estrada	Chino
Jimmie Estrada	Chino
Harry Taube	Upland

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



## PRESIDENTS'

## DAY

FEB. 20, 2023

**Chapter 044 Meetings,**  
2nd Wed. of Even Months - 12 noon  
**GOLDEN CORRAL**  
**1640 E. 4th St. #A, Ontario**



*It would be appreciated if all luncheon attendees wait  
after registration and after the meeting has been  
called to order, before going to the dining room.*

## \*Lunch-Fee-Schedule for Chapter 044 meetings, Calendar Year, 2023

Member of Chapter #044	Free
RPEA Member	\$4.00
Non-member of RPEA	\$14.00
Prospective Member of RPEA (maximum two times)	\$4.00
Chapter Guest	Free



\*Lunch is complimentary for all attendees at  
Holiday Meeting, December 13, 2023

## Meeting Dates and Guest- Presenters for Calendar Year, 2023

February 08, 2023 - David Patterson, Tax Counselor for  
AARP Tax-Aide Program.

April 12, 2023 - TBD

June 14, 2023 - TBD

August 09, 2023 - TBD

October 11, 2023 - TBD

December 13, 2023 - (Holiday Meeting--no speaker)

## A WARM WELCOME TO THESE NEW MEMBERS OF CHAPTER 044

Debra Cauchi	Winter Haven, FL
Ralph Duran	Ontario
Adrian Hollinger	Jurupa Valley
Carole Lange	Claremont
Carols Preciado	Rancho Cucamonga



## Holiday Meeting Wrapup:

Twenty-nine (29) attendees enjoyed  
lunch, camaraderie, and gift raffles  
at the annual Chapter 044 Holiday  
Meeting on December 14, 2022,  
at *Golden Corral*.



Our thanks and appreciation go to Bob and  
Sandie Seigler, who coordinated the purchas-  
ing and presentation of the raffle gifts and  
decorations for the holiday meeting, as they  
have done in many previous years. Each  
attendee went home with either a beautiful  
gift or cash prize.



## NEWS & VIEWS

### POMONA VALLEY 044

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



#### PAST PRESIDENT'S MESSAGE--

The first *CalPERS* Board meetings for 2023, were held this week. I was able to view portions of the *live webcast*. New Board members, Retired Member Representative Yvonne Walker and School Member Representative Kevin Palkki were sworn in.

Kevin Palkki fills the seat vacated by Rob Feckner who was the Board's longest-serving member. I learned that *Lincoln Plaza* auditorium was recently renamed *Feckner Auditorium* in his honor.

*RPEA's* endorsed candidate in the runoff election for Retired Member Representative Randall Cheek will not become a stranger to *RPEA*, as he continues to serve as its Legislative Director.

May you and your families stay well and safe,

--Shirley Wofford

#### RPEA CHAPTER 044 MEETING

Wed., February 08, 2023, 12 noon

**GOLDEN CORRAL**  
1640 E. 4<sup>TH</sup> St. #A  
Ontario, CA 91764  
(909)395-0500



If you need a ride to a Chapter meeting and you do not have family/friend support for help with arranging transportation, please call the Chapter 044 President at least two days in advance.



Chapter 044 and other members of *RPEA*, family members, friends, and anyone else who supports *RPEA* are welcome at our meetings.

