

# LOIS

## LOTS OF INTERESTING STUFF

BY ROBERT D FLACH

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**FEEL FREE TO PASS ALONG THIS ISSUE OF LOIS TO FRIENDS, FAMILY MEMBERS, CO-WORKERS, WHOMEVER. LOIS IS **FREE** TO ALL!**



### DID YOU KNOW?

When CBS first approached Lucille Ball to do a tv series they did not want it to co-star Desi Arnaz, as Lucy had wanted, because he was a Cuban. The network didn't think audiences would buy the marriage of an all-American girl and a Latino.

Lucy saw the television show as a great opportunity to work with Desi and perhaps save their shaky marriage. To prove the network wrong Lucy and Desi developed a vaudeville act that they took on the road with Desi's orchestra. The act was a hit and convinced CBS executives that a Ball-Arnaz tv pairing would work.

Or so I recently learned from AN EVENING WITH LUCILLE BALL: "THANK YOU VERY MUCH" (<http://aneveningwithlucilleball.com>), which I saw at the SurfFlight Theatre in Beach Haven on Long Beach Island. The one-woman show, starring Suzanne LaRusch, was written by Ms LaRusch and Lucie Arnaz and directed by Lucie Arnaz.

In 1950 CBS had asked Ball to take her successful radio comedy MY FAVORITE HUSBAND to television with co-star Richard Denning. The radio program was written by Bob Carroll Jr and Madeline Pugh, who would go on to write for I LOVE LUCY, and co-starred Bea Benaderet and Gale Gordon as their neighbors. This is the show that eventually became I LOVE LUCY.

Bea Benaderet and Gale Gordon were Lucy and Desi's first choice to play the Mertzes, but the actors were unavailable. When they came across William Frawley, Desi Arnaz wanted him, but he was told that Frawley would be a poor choice because he was a womanizer, a gambler, and a drunk. Arnaz said, "He's perfect!" It is rumored that Frawley and Vivian Vance did not get along off-screen.

Gale Gordon went on to play the principal on OUR MISS BROOKE (see below for Lucy connection). He guest-starred on I LOVE LUCY and later co-starred with Lucy in THE LUCY SHOW and HERE'S LUCY. Bea Benaderet was unavailable for I LOVE LUCY because she was already cast at George Burns and Gracie Allen's neighbor Blanche Morton on their tv show. Bea was the original voice of Betty Rubble of THE FLINTSTONES, and also appeared in THE BEVERLY HILLBILLIES and starred in PETTICOAT JUNCTION.

Before deciding to do MY FAVORITE HUSBAND on radio Lucy was offered the title role in the radio series OUR MISS BROOKS. This show eventually went to Eve Arden, and was also taken to television.

Lucy first met Desi when she appeared as his love interest in the 1940 RKO movie adaptation of the successful Rodgers and Hart Broadway musical TOO MANY GIRLS. Desi reprised his Broadway role in the movie. The movie was the film debut of co-star Eddie Bracken, also reprising his Broadway role, and Van Johnson as a member of the chorus, and introduced the standard "I Didn't Know What Time It Was".

Desi Arnaz invented the television rerun during the pregnancy episodes of I LOVE LUCY when he re-aired episodes from the first season to give Lucy some rest. He also pioneered the use of three cameras simultaneously for filming a sitcom, resulting in high-quality prints preserved for future TV audiences.

And one more bit of I LOVE LUCY trivia. The famous "valentine" opening credits we know from syndication were not the original opening credits. They were added when CBS began rerunning the series in 1958. Originally the credits featured animated stick figures of Lucille Ball and Desi Arnaz along with the sponsor's product, for example Phillip Morris cigarettes.

If AN EVENING WITH LUCILLE BALL: "THANK YOU VERY MUCH" appears in a theatre near you I would recommend you check it out.

## TOP TEN TAX TIPS

1. File your return or extension request **on time**, even if you cannot pay all, or any, of the tax due. The penalty for **paying** late is .5% (.005) of the tax due per month, or part thereof, but the penalty for **filing** late is 5% (.05) per month - **10 times as much!**

2. Do not ignore IRS or state tax notices. Send a copy of the notice to your preparer **immediately**. If you prepared the return yourself and you don't understand the notice consult a professional.

3. But do not automatically pay the amount requested on an IRS or state tax notice. In my experience **more than 50% of all federal and state tax notices are incorrect**. Check the information being questioned, and send a copy of the notice to your preparer.

4. In preparing your tax return you are often given choices on how to treat a certain situation or item (i.e. joint or separate, credit or deduction, depreciate or Section 179). **Review each option and do separate tax calculations to see which choice results in the lowest tax**. Also consider how the various federal options affect your resident and non-resident state and local tax returns.

5. If you are planning to make a contribution to a traditional or ROTH IRA, a Coverdell Education Savings Account, a Health Savings Account, or a Section 529 College Savings Plan, do so **as early as possible** in the year. By making your contribution on the first available day of each year you will have **substantially more** in the account by the time you are ready to retire, or when you need the money to pay for education or medical bills, than if you wait till the last minute.

The image shows a 1040 U.S. Individual Income Tax Return form. The form is filled out with handwritten information. The 'Adjusted Gross Income' section shows a total of \$27,000. The 'Total tax' section shows a total of \$2,700. The form includes various sections for income, deductions, and credits.

6. Whether or not you normally itemize your deductions on Schedule A, keep good records of all your "itemize-able" deductions throughout the year - **just in case**.
7. Take advantage of your employer's **flexible spending accounts** for health care and dependent care costs. You will save both income tax **and** FICA tax **and** reduce your Adjusted Gross Income.
8. Get an Employer Identification or Social Security number for **all** child care providers **up front**. The IRS will disallow the child-care credit if an id number is not listed for each provider.
9. The IRS is picky about matching names to Social Security numbers. If a Social Security number reported on your tax return does not match **exactly** the name in the files of the Social Security Administration, the IRS will remove the dependency exemption of that person and any applicable credits. Be sure to check the accuracy of **all** Social Security numbers on **all** pages of your return before mailing it. If you have changed your last name as a result of marriage, make sure you have notified the Social Security Administration of the change by requesting a new Social Security card ASAP.
10. Keep up-to-date on IRS and state rules and regulations and changes in the tax laws. Even if your returns are prepared by a tax professional, the more informed you are the more prepared you will be when you go to your annual tax appointment. You can stay up-to-date by becoming a regular visitor to my weblog THE WANDERING TAX PRO at <http://wanderingtaxpro.blogspot.com>.

**ITEMIZED DEDUCTIONS: A COMPLETE GUIDE TO SCHEDULE A: 2011 EDITION**  
*by Robert D Flach, the internet's WANDERNG TAX PRO.*

A comprehensive report that discusses just about everything that is, and is not, deductible on the Schedule A, updated for tax year 2011. It discusses -

Deducting Medical Expenses, Deducting Taxes,  
 Deducting Interest,  
 Deducting Contributions,  
 Deducting Casualty and Theft Losses, and  
 Deducting Miscellaneous Deductions

The report, which will be sent as a "pdf" email attachment, includes a special section on Keeping Track of Business Expenses, Keeping Track of Gambling Activity, and The Dreaded Alternative Minimum Tax, and 14 forms, schedules and worksheets to help document 2011 deductions.

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AccuBroadway.com is the world's first and only personalizable, multichannel, all-Broadway radio station, with over two dozen channels of great musicals!

You'll find everything from classic shows like "South Pacific," "My Fair Lady" and "The Sound of Music" to modern shows like "Avenue Q" and

"Jersey Boys." Plus the channels are customizable to your exact tastes! And they're free!

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You can choose Broadway shows by decade, composer, specialty (i.e. London casts, revivals, Overtures, and pop and jazz versions), school age (kids, middle school, high school, college), and various years of Tony winners.

[www.northpole.com](http://www.northpole.com)

This site shows what's happening in Santa's Secret Village. Kids can create their own story book, play games, read Christmas stories, write a letter to Santa and send Christmas Postcards to their friends.

[www.allthingschristmas.com](http://www.allthingschristmas.com)

Here you will find holiday treasures such as printable cards, lyrics to your favorite Christmas carols, songs in MIDI format, unique craft ideas, decorating and tips for Christmas shopping and hostess gifts. It has a lot of holiday stories, delicious recipes, links to other holiday web sites, and more, including a Christmas for kids-section, which offers fun, games, riddles, printables and other goodies just for kids.

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### I LOVE A FILM CLICHE

I love the Turner Classic Movies cable tv station. On occasion TCM runs episodes of classic detective movie series from the 30s and 40s. It is just another reason why TCM is the absolute best cable, or broadcast, television station around.

Here are some of the series that I have seen on TCM over the years-

\* Two famous film series about literary detectives that began with George Sanders as the star - The Saint, more famous as a British tv series with Roger Moore, and The Falcon. Interestingly enough, after making 3 Falcon films Sanders decided to retire from the role, and in the 4th of the series, THE FALCON'S BROTHER, Sanders was killed in the end and his fictional brother, played by Sanders real-life brother Tom Conway, took over as the new Falcon and continued for all but the last three of the 16-film series. FYI - when called THE GAY FALCON the reference was not to the detective's sexual preference. Back then gay meant something else entirely.

\* The adventures of retired jewel thief Boston Blackie, brought to life by Chester Morris, a real-life amateur magician who shared the hobby with his screen character, and his sidekick "Runt". I had seen many of the Blackie movies during my youth on Saturday afternoon television. It was one of the few series in which the same actor played the lead throughout the run.

\* The Perry Mason series, which, while keeping the actual ESG mysteries intact, took too many liberties with the characters, portraying Perry as a drunk bon vivant amateur chef who marries Della Street in one episode, a far cry from the more true to the books portrayal of Raymond Burr with which all boomers are familiar, and Paul Drake as a typical bumbling movie sidekick nicknamed "Spudzy".

\* Another retired jewel thief who appeared in a series of 15 files over 14 years - Michael Lanyard, aka the Lone Wolf. This literary detective's nickname was actually the



source of the popular term "lone wolf", used to describe "one who prefers to go without the company or assistance of others."

\* The uniquely named debonair detective Philo Vance, whose initial entry, THE CANARY MURDER CASE was completed as a silent film and hastily adapted for sound for its 1929 release. This series included THE GRACIE ALLEN MURDER CASE, not among the TCM offerings, written especially for the comedienne by Vance's creator S.S. Van Dine. A later entry in the series, CALLING PHILO VANCE, was actually a remake of the earlier THE KENNEL MURDER CASE, both of which have been shown on TCM.

\* A very interesting series I had never heard of before about Nick and Nora-ish rare booksellers Joel and Garda Sloane, from a novel by famous screenwriter Harvey Kurnitz writing as Marco Page. There were three films with three separate sets of actors playing the couple - Melvyn Douglas and Florence Rice in FAST COMPANY, Robert Montgomery and Rosalind Russell in FAST AND LOOSE, and Franchot Tone and Ann Sothorn in FAST AND FURIOUS, directed by Busby Berkeley.

\* And of course, the father of all such detective series - William Powell and Myrna Loy as Nick and Nora Charles. Of course you do know by now that the Thin Man was not Nick Charles but a character in the first book that never reappeared, despite the movies' titles.

While the individual detectives had their unique quirks and subtle differences, to be perfectly honest in many cases the characters and stories are interchangeable. All the heroes are handsome, urbane, witty, and intelligent, generally with some kind of shady past or underworld connection. They usually have a comic relief sidekick and, even if married, are often in the company of a beautiful dame. And they are frequently at odds with a hard-boiled police lieutenant or inspector with a blundering sergeant. They become involved in the mystery or adventure to help a friend, or one of the aforementioned beautiful dames, or to clear themselves of wrongful charges. As some of the films were made during the war years, the heroes occasionally tangled with Nazis and foreign spies.

While these films were considered to be "b" films they often featured actors and actresses early in their careers who would later go on to fame on the big and small screens. One young dame who crossed paths with Boston Blackie was Harriet Hilliard, who would marry a band leader named Nelson and raise her two boys on radio and television.

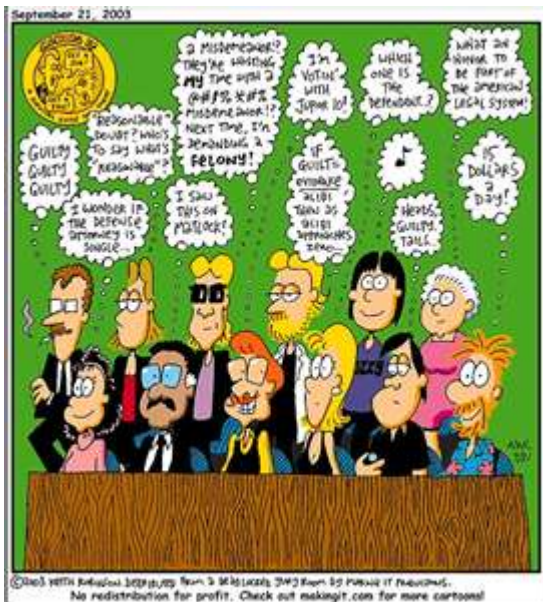
As with any genre, some series were better than others. And as with any episodic series, some entries, usually the earlier ones (although not always), were better than others. With few exceptions, different actors portrayed the various detectives during the runs of the individual series, and some casting choices were far superior to others. But they all were entertaining.

A few of the movie series were later translated to the small screen - Boston Blackie, The Thin Man (which starred Peter Lawford as Nick Charles), and of course Perry Mason and the Saint.

TCM has also offered the comic series about radio detective The Fox, which starred Red Skeleton "Whistling" in Dixie, Brooklyn and the Dark, and Margaret Rutherford's classic run as Agatha Christie's Miss Jane Marple.

Some bits of movie trivia - Joan Hickson, who played Miss Marple in the first BBC series, had a minor supporting role in MURDER SHE SAID (not Wrote). And did you know that before she updated the Marple retired school teacher detective character to modern day Jessica Fletcher, Angela Lansbury was Jane Marple in the 1980 film THE MIRROR CRACK'D, whose cast included Rock Hudson, Liz Taylor, Kim Novak, Tony Curtis and Pierce Brosnan.

Become a regular visitor to my blog **THE WANDERING TAX PRO** for -  
 up-to-the-minute advice, information, resources, and commentary on federal and  
 NJ state income taxes and the NJ property tax rebate programs;  
 updates on federal and state tax legislation, IRS and NJ Division of Taxation  
 rulings and regulations, and federal and NJ tax court decisions;  
 insights and observations on operating a tax preparation practice, and  
 information on other online tax planning and preparation resources.  
 Hope to "see" you soon at <http://wanderingtaxpro.blogspot.com>



**REFLECTIONS ON JURY DUTY**

Readers of THE WANDERING TAX PRO know that I recently served on a jury panel. I thought I would take some time to reflect on my experience.

This was my 5<sup>th</sup> call to jury service. The first time I was picked as juror for a civil case, but was the alternate juror and not involved in the final decisions. The second time I was called to service in Union County, based on my zip code, but I did not live in Union County (my town at the time was small and used the zip code of a neighboring city) and was excused. I was next chosen for a criminal case, which was settled via plea bargain prior to completion. The 4<sup>th</sup> time I was not picked for a panel and was finished after sitting in the jury management room for two days (reading a mystery book). This was the first time I would actually "deliberate".

It took three full days and over 100 potential jurors (three separate groups of 40 each were sent to the courtroom) to come up with the required 14 for a panel (there are 2 alternatives, who are chosen after the closing arguments and prior to deliberation and wait in another room while the remaining 12 decide on a verdict). I was picked to fill the last open seat late in the afternoon of my first day.

The selection process was slightly different from my previous experience. In the past, upon being sent to a courtroom, we had to fill out a questionnaire that included the ability to provide narrative answers. Fourteen names were called and we filled the jury box. The questionnaire of each one called was given to the judge and, based on the answers, we were each asked questions of clarification in open court. As the answers were given aloud in hearing of all, those answers that caused a juror to be excused, especially those concerning personal prejudices and experiences, could be "adapted" by a subsequent juror who wanted to be excused.

This time around we were given a questionnaire with spaces for 27 yes or no answers. The judge asked each question individually - with the question on view on a screen. After the first 6 were asked we were instructed that anyone with a "yes" answer was to line-up and each person was questioned by the judge and the attorneys in private at "side bar".

These were the questions that asked if we knew the defendant, the attorneys, the judge, the jurors in the box, the area where the crime was committed, or any of the listed witnesses, or if there was a financial, medical, or other hardship that would

not permit us to serve the entire anticipated length of the trial (we had been told it would end on November 18<sup>th</sup>, my birthday).

One of the names listed on the witness list, a police officer with the BCI unit, was a 1040 client of mine - but at side-bar I was told the prosecution did not plan to call him to testify (he would only possibly be mentioned in testimony, although as it turned out he actually was not), so it did not matter.

Those of us left - about 1/3 were excused during this step - then completed the rest of the questions. We were asked if we had ever been a victim or a crime, had ever testified in court before, or had ever served on a jury before (I answered yes to all three), as well as questions about our individual prejudices and beliefs, followed by another queue and more questions in private. Neither of my yeses, explained at side bar, got me excused.

At this point less than half of the original 40 remained, and the court clerk called out a name of a juror, based on the jury number, who took the remaining open seat in the jury box and was asked to tell the court about himself/herself - i.e. employment history, family size, what one watched on tv, and what one used as a source of news information. One by one potential jurors were excused by either the Prosecutor or the defense attorney. I was the 4<sup>th</sup> name called and I apparently passed muster (despite the fact that I mentioned many of my 1040 clients over the past 40 years were law enforcement officials). We now had a full panel.

My panel was indeed diversified, with 4 males and 10 females. We had black, white, Latino and Indian (as in India) members. WASPs, like me, were certainly not the majority. Both the defendant and the victim were young black men. I was the second oldest panel member - most of my fellow jurors were considerably younger.

The attorneys were neither McCoy nor Matlock. Actually the trial experience was really nothing like what we see on television. Of the two lawyers the defense attorney, who was **not** a Public Defender, appeared to be the more experienced and the more comfortable in examining witnesses.

I noticed a particular trick of his during the trial. He would appear to be looking through his pad and other papers at the defense table for something specific, and would apologize to the judge, asking for her indulgence. At this point, when the witness was off-guard, he would fire off a question, while continuing to search and not looking at the witness.

The "second chair" on the defense table, a younger female, emulated her employer's style, and his unique trick, when she was cross-examining witnesses.

The Prosecutor, who did not have a second chair, never really asked a direct question. Each question was prefaced by "I want to ask you" or "I am going to ask you". Never just "do you recall" or "what did you do next". I was waiting for a witness to respond, "OK, go ahead and ask me". He was, however, meticulous, often boringly so, when introducing items that would eventually be placed into evidence, I expect to avoid possible appeals.

We had been told by a bailiff that this was our judge's first criminal trial, which she confirmed when she came into the jury room after everything was over, sans robe, to personally thank us and ask if we had any questions about the process.

The lesson I had learned from a previous trial was reinforced - no two individuals who witness the same activity from different perspectives will provide the exact same description. Actually, if they did I would question their veracity.

In this trial there were a total of 5 witnesses to the various components of the crime. Each was asked to make a drawing of the situation as they remembered it, and each picture was different, as were remembrances about the height of the parties involved and details of the clothes each wore. Our verdict was based on our faith in the eye-witness testimony by the main Prosecution witness.

Before adjourning to the jury room the judge charged juror number one, an older woman, with being the Foreperson, if she would so accept. She did not, nor did the next juror in numerical succession. Juror number 4, the first male asked, accepted the charge. FYI, I was juror number 10 (even though I was the last one selected).

As mentioned above, the final 12 were neither all men, nor were we particularly angry. We reviewed the pictures, drawings, and other items that had been placed in evidence and seriously and sincerely discussed the matter in some detail. The judge's instructions took an hour to read as we sat in the jury box, and we had asked if we could have a hard copy of these instructions to refer to in our deliberation, but were told we could not be given such a copy.

We had initially been told that our day would be 9:00 AM to 4:00 PM with an a lunch break from 12:30 - 1:30. As the trial began we were instructed to be in the jury room by 9:30 each morning (at 9:00 only once), and were usually dismissed for the day between 4:15 and 4:30 in the afternoon, except for the day of deliberation. We rarely took our seats in the jury box before 10:30 in the morning or 2:00 in the afternoon. It seemed we spent almost as much time waiting in the jury room as we did in the actual courtroom.

During the two weeks of the trial we were off two days for legal holidays and one and a half day when the jury was not required to be available due to administrative work by the court. Our pay was \$5.00 per day for the first three days and \$40.00 per day for each additional day. Getting there by bus cost me \$3.00 round-trip, and there was daily parking available nearby for \$8.00 per day. Because of my unique self-employment situation I actually made a profit being on the panel.

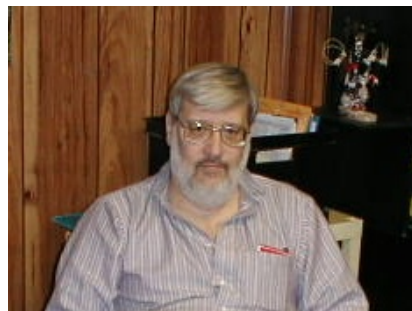
It was certainly an interesting experience, and in reflection I am glad I was involved in the entire process for a change. I now cannot be called again for at least three years. I expect this was not my last experience as a juror.

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**RAMBLINGS (OF A RELATIVELY SANE MIND)**

Those of you familiar with my blog writings know that I never refer to our elected officials in the Senate and House of Representatives without using the adjective "idiot" - i.e. the "idiots in Congress".

The recent failure of the so-called "Super Committee" to accomplish anything in three months of talks just reinforces this description.



There are several adjectives and phrases that can be used to describe our elected officials in Washington (and elsewhere) - perhaps more today (and maybe the last 20 years) than at any other time in America's history, or at least my lifetime.

They are certainly self-absorbed. I suppose some degree of self-importance (although not quite at the level of a Donald Trump) is either a requirement for or a side-effect of becoming a politician. It is a proven fact that the first and primary motivation and goal of any politician is getting re-elected, and not the proper administration of government (we are lucky if that is second or even third).

They are obviously lazy, reacting to situations with the easiest quick and temporary fixes rather than responding to problems with serious thought and consideration.

They are incapable of independent thought, constantly quoting verbatim from the script written by their Party, and voting along strict Party lines.

If a Democrat introduced a bill that would, for example, guarantee the end of our economic troubles for decades to come, Republicans would automatically vote against it



for no other reason than the fact that it was not introduced by a Republican - even if they support the concept in the legislation. And vice-versa.

Other commentators and bloggers have used such descriptions as "the most self-serving, mediocre and uncaring set of legislators in Congress in the last 50 years" and "polarized and vituperative".

The American public has apparently joined me in my disgust of these cafones. Recent polls indicate that the approval rating of the idiots in Congress is about 9% - only slightly more than that of Fidel Castro, but less than the rating of BP during the oil spill. The IRS is 4x more popular than Congress!

And so the best way to sum up all of this, and more, in a proper description of the members of Congress, of all political affiliations and philosophies ("clowns to the left of me, jokers to the right" for sure), is to, as my British friends would say, "call a spade a shovel" and refer to them as idiots.

Here is an idea - the American public should join together next November to vote out every single idiot in Congress who is running for re-election (as long as we do not vote in any Tea Party members or supporters). Let us embrace the spirit of GRIP - **Get Rid of Incumbent Politicians!**

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#### AN INTERESTING QUESTION

Readers of THE WANDERING TAX PRO often submit tax questions for my consideration. Here is an interesting one I received a few years ago -

**Q.** Can you cash a check from the collection plate in church?

**A.** That is not a tax question. But I know what you are getting at, you sly dog - and that is cheating!

I remember reading many years ago of a church member who approached the pastor with a concern. It seems that the cash from the Sunday collection plate was placed in a safe in the church office overnight and not deposited until Monday. The member was concerned about leaving large sums of money in what was not a very sturdy safe overnight, as the church was not in the best of neighborhoods.

The church member had a retail business and needed cash in all denominations for the register. He came up with an idea that would benefit both the church and himself (you bet it would benefit himself). Each Sunday after the service he would give the pastor a check for the bulk of the cash in the collection plate and take the cash for use in his retail store. The pastor thought this was a wonderful idea and took him up on it.

Each week the member would write a check, payable to the church and not to "cash" (he told the pastor a check payable to the church could not be cashed by a thief, while one made out to "cash" could) for a nice round figure (\$200.00 and not \$203.75 - this was easier for his bookkeeping he said) to cover the bulk of the cash in the plate.

When it came time to prepare his taxes he claimed as a charitable contribution the sum of all the checks he had written to the church during the year, which included his normal pledge and holiday donations as well as the weekly checks he wrote to the church for the cash in the plate!

I don't remember how this person had been caught - only that his "scam" had indeed been uncovered by the IRS in audit.

Needless to say this is pre-meditated tax fraud, and anyone who does this is subject to all the various and sundry criminal penalties and fines that go with tax fraud.

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### ALWAYS LEAVE 'EM LAUGHING

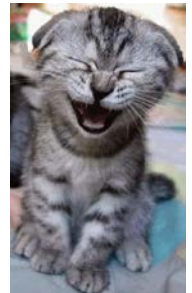
Three contractors are bidding to fix a broken fence at the White House in D.C. -- one from New Jersey, another from Maryland and the third from Florida. They go with a White House official to examine the fence.

The Florida contractor, Jonathan, takes out a tape measure and does some measuring, then works some figures with a pencil. "Well", he says, "I figure the job will run about \$900: \$400 for materials, \$400 for my crew and \$100 profit for me."

Cletus, the Maryland contractor also does some measuring and figuring, then says, "I can do the job for \$700: \$300 for materials, \$300 for my crew and \$100 profit for me."

Vito from Jersey doesn't measure or figure, but leans over to the White House official and whispers, "\$2,700". The official, incredulously, says, "You didn't even measure like the other guys! How did you come up with such a high figure?" The New Jersey contractor whispers back, "\$1000 for me, \$1000 for you, and we hire the guy from Maryland to fix the fence."

"Done!" replied the government official.



**MERRY CHRISTMAS AND HAPPY NEW YEAR!**

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