



Wanted: Tax Volunteers

IRS estimates that Forsyth County taxpayers did not receive over \$8,000,000 in Earned Income Tax Credit (EITC) for which they were eligible. The Volunteer Income Tax Assistance (VITA) program helps low-income individuals and families prepare accurate returns and bring those funds into our community.

What do tax volunteers do?

There are two volunteer opportunities: Volunteer Tax Assistor and Intake Coordinator/Greeter.

Volunteer Tax Assistors prepare basic tax returns, using Tax Wise online software. They help low-income people file accurate federal and state returns and get all the deductions and credits they are entitled to receive, including the Earned Income Tax Credit.

Intake Coordinator/Greeters welcome clients, help them complete an Intake questionnaire, make sure they have all the documents they need, and direct them to the complementary on-site services where available.

Why is this free tax preparation program important?

First, you are directly helping people who don't make a lot of money to get what they've earned. Even if a taxpayer isn't eligible for the EITC, you have saved them hundreds of dollars that a tax preparation firm would charge. And if you have filed for the EITC for someone who would otherwise have filed a 1040-EZ and missed this credit, your work may have added up to \$5028 to their household. Think what difference that could make for a family trying to buy their first house, pay off bills, or just provide clothes and food for their children.

Second, the EITC helps our local economy. The \$8,000,000 (yes, eight million dollars) the IRS estimates that Forsyth County taxpayers did not claim in EITC is money that could be spent locally and support our local economy. By offering free tax preparation, you can help ensure that those dollars come home.

Do I need to be a "math" person to volunteer as a Tax Assistor?

Not at all. The software does all the math. You need to like to meet new people and to think logically, so that you get the information you need to complete the return. You also need basic computer and typing skills.

How do I get the training?

You must be certified by the IRS at the Basic and Intermediate level to be a Volunteer Tax Assistor. Greeters must be certified at the Basic level.

There are several ways to get the training:

- A free two-day Training Workshop will be offered December 5 and 12 (Saturdays) from 8:30 – 4:30 at the WFU Worrell Center. This workshop includes Tax Law (teaching you the questions to ask) and using the Tax-Wise software. Workbooks are provided.
- You can take an online "Link and Learn" course from the IRS. The 2009 tax year course and information will be available soon at <http://www.irs.gov/app/vita/index.jsp>. If you do

this, you can get the accompanying workbooks from Shirley Abdullah or Phiphine Tart-Moore at the Experiment in Self-Reliance or download them as PDF files from the ForsythFreeTax.org website. The Link and Learn course also provides a Practice Lab using the online software.

- You can also use the workbooks alone to study for the tests.

There is no charge for the training or materials.

How do I take the certification tests?

To be certified, you must pass the Basic and Intermediate tests, either online or on paper (if on paper, Shirley Abdullah at ESR will grade your test). If you take the tests online, you can print out your certificates and bring them to the first session. The tests are open-book and not timed. They give you practical scenarios to show that you understand the simple returns you will be preparing.

How much time am I expected to volunteer?

Volunteer Tax Assistors are asked to commit at least ten hours a month for the 3-month tax season (30 hours total, mid-January to mid-April), but most volunteer one or two sessions a week (three to four hours each). You can be flexible and volunteer at different sites as your schedule permits. You can sign up for the shifts and locations that are most convenient.

Intake Coordinator/Greeters are asked to work for 4 hours at least once a week.

Where are the tax preparation sites this year?

VITA sites for 2010 will include libraries and agencies throughout Forsyth County with morning, afternoon, evening, and Saturday hours available.

What if I make a mistake?

No one's perfect. But you will be well trained and there are several checks on your work. The tax software catches most errors, and the site manager, a Quality Specialist, or VITA director review each return before it is actually filed.

As a VITA volunteer you are protected from any liability for any mistakes you make.

How long does it take to prepare a return?

Most returns can be completed in a half-hour or so. Returns for taxpayers who have multiple employers or many dependents, child care expenses, and education or first-time homebuyer credits may take longer. Careful preparation is more important than speed. You want to make sure that the taxpayer reports income and deductions accurately, pays only what he/she owes, and gets the maximum refund for which he/she is eligible.

I need more information!

Go to ForsythFreeTax.org for more information about the Volunteer Income Tax Assistance program, or call Shirley Abdullah at ESR - 722-9400 x 450 with your questions or to sign up and get materials. You can also send her an email (Shirley.Abdullah@eistr.org) with your contact information.