

# VOLUNTEERS NEEDED!



## BECOME A VITA VOLUNTEER!

Volunteers Are Needed for  
the Upcoming Tax Season.  
(January 27 to April 15)

No prior tax experience  
required.  
**FREE** training is provided.

### Why volunteer for VITA?

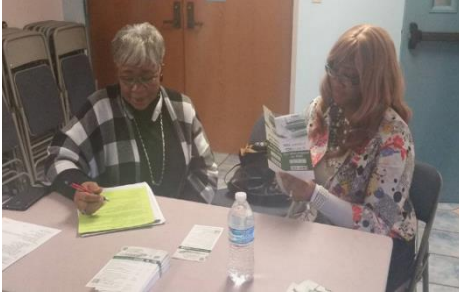
- ☆ FREE tax preparation for qualified individuals and families
- ☆ Variety of volunteer opportunities
- ☆ Flexible schedule
- ☆ Convenient site locations throughout the West Valley
- ☆ Friendly, welcoming & professional environment
- ☆ Accomplish the volunteer hours' requirements for students
- ☆ Learn a valuable life-skill and get hands-on job experience
- ☆ IRS tax law certification and the experience looks great on resume
- ☆ Satisfaction of helping the community
- ☆ Tax professionals earn Continuous Professional Education (CPE) credits

VITA is an exciting, educational and enjoyable opportunity. Interested? [Sign-Up here for VITA Information Session](#) and see what a difference volunteering makes!

For more information, contact Puja Sachan: [PSachan@TurnANewLeaf.org](mailto:PSachan@TurnANewLeaf.org)

<https://www.turnanewleaf.org/services/financial-empowerment/vita-program.html>

# VOLUNTEER ROLES

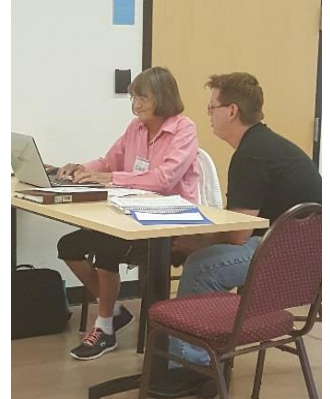


## GREETER / SCREENER

- Greets the taxpayers and ensure they get the required assistance.
- Ensure that the taxpayers have all the necessary documents.

## TAX PREPARER

- Prepares basic or advanced 1040 tax returns and related schedules for eligible taxpayers
- Interviews taxpayers to determine if all income, deductions and allowable Interviews taxpayers to determine if all income, deductions and allowable credits are claimed



## SITE COORDINATOR

- Provide coordination, organization and supervision of the VITA site and volunteers
- Ensures that all volunteers adhere to IRS Volunteer Standards of Conduct and Quality Site Requirements
- Coordinates volunteer schedules and compiles reports on a monthly basis.

## INSTRUCTOR

Completes IRS tax law certification (required annually) and thereafter facilitates tax law and tax preparation software training sessions.



## INTERPRETER

Assists with interpretation between the taxpayer and the VITA program volunteers to ensure accurate information is being shared.

**We request volunteers to serve a minimum of 4 hours a week.**

<https://www.turnanewleaf.org/services/financial-empowerment/vita-program.html>



## Volunteer Income Tax Assistance (VITA)

### Frequently Asked Questions

#### What is VITA?

- VITA sites provide free tax preparation services to low and moderate income individuals and families.
- VITA volunteers are certified to IRS Standards and prepare basic tax returns which can be filed electronically to expedite the process.
- **All Services are provided free of charge.**

#### What is A New Leaf's Involvement in VITA?

- A New Leaf partners with the Internal Revenues Service (IRS) and other community partners to support VITA sites in the West Valley.
- Our goal is to increase public awareness of the Earned Income Tax Credit (EITC) and other available credits, provide free tax preparation services and promote asset-building opportunities through financial literacy training.

#### How does VITA help the community?

- During the 2019-20 tax season, 3,725 households and individuals who had their taxes prepared at VITA sites located throughout the West Valley received an **estimated 6 million dollars in tax refunds**, and **saved an estimated \$800K in Tax preparation fee**.

#### How can I get involved?

- The VITA/EITC initiative is an entirely volunteer driven project. VITA volunteers donate their time to assist as site coordinators, tax preparers, greeters, screeners and interpreters.
- **Free training is provided and no prior tax preparation experience is required.**

#### Volunteer Job Descriptions

**Tax Preparer** – Prepares basic 1040 tax returns and related schedules. Individual will also be able to answer tax law and *TaxSlayer* questions.

**Greeter/Screeners** – Greets taxpayers visiting the site to create a welcoming atmosphere and performs the screening process of all taxpayers' documents prior to moving them to the Tax Preparer.

**Reviewer or Tax Return Closer** – After tax returns are prepared, the Reviewer/Closer meets with taxpayers to go over the tax return one more time and then finish the process of printing and having the returns signed.

**Interpreter** – Provide bilingual assistance for Spanish (or another language) speaking clients seeking tax preparation services.

- Volunteers are asked to commit to a minimum of 40 hours at a VITA site during tax season, late January through April 15<sup>th</sup>.

#### Do you have to know tax law or be an accountant to volunteer?

- No, only the spirit of volunteerism is needed, but volunteer tax preparers are required to be IRS Certified.
- Free certification courses are held evenings and/or weekends and will be offered starting in late November through early January. The training sessions take place at several locations throughout the West Valley.
- The classes are typically 28-32 hours total, with the certification test taken online at the IRS website during the class. Volunteers can also certify on their own through an e-learning training on the IRS website.

For more information, contact Puja Sachan: [PSachan@TurnANewLeaf.org](mailto:PSachan@TurnANewLeaf.org)

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## (VITA)-Asistencia Voluntaria de Impuestos

### Preguntas Frecuentes

#### Que es VITA?

- Los sitios de VITA proporcionan asistencia para la preparación de impuestos gratis a individuos y familias de ingresos bajos y moderados.
- Los voluntarios de VITA están certificados con las normas del IRS y preparan declaraciones de impuestos básicos que se pueden presentar y mandar electrónicamente para avanzar el proceso.
- **Todos los servicios son proporcionados sin costo.**

#### Cual es la participación de A New Leaf en VITA?

- A New Leaf conjunto de con Servicios Internos (IRS) y otras agencias de la comunidad trabajan para apoyar a los sitios de VITA en el Valle Oeste.
- Nuestro objetivo es aumentar la unidad pública sobre el Credito de Impuestos (EITC) y otros créditos disponibles y ofrecer servicios de preparación de impuestos gratuitos y promover oportunidades de creación de bienes a través de la educación financiera.

#### Como ayuda VITA a la comunidad?

- Durante la temporada de impuestos 2019-20, 3,725 hogares que tenían sus impuestos preparados en los sitios de Vita ubicados en el valle oeste recibieron estimados \$6 million dólares en reembolsos de impuestos, dólares que regresan a la comunidad donde vivimos y trabajamos.

#### Como puedo ayudar?

- La iniciativa de VITA/EITC es completamente llevada acabo con voluntarios. Los voluntarios de VITA donan su tiempo como coordinadores de sitio, preparadores de impuestos, asistentes, evaluadores y interpretes.
- **Entrenamiento es proporcionado gratis sin experiencia necesaria.**

#### Descripciones de trabajo de Voluntarios

**Preparador de Impuestos**– Prepara la forma básica y hojas correspondientes. El individuo también será capaz de responder preguntas acerca de la legislación fiscal y TaxSlayer.

**Asistidor**–Ayuda a los clientes para crear un ambiente acogedor y realiza el proceso de evaluación de todos los clientes antes de pasarlos al preparador de impuestos.

**Cerrador de Impuestos**– Después de que las declaraciones de impuestos sean revisadas, se reunirá con los clientes para finalizar el proceso de imprimir y firma los retornos.

**Interprete** – Proporciona asistencia bilingüe para los clientes que buscan servicios de preparación de impuestos en Español.

- Se les pide a los voluntarios que se comprometan a un mínimo de 40 horas en un sitio de VITA durante la temporada de impuestos, que comienza los finales de enero hasta el de 15 de Abril.

#### Tiene que saber la ley de impuestos o ser un contador para ser voluntario?

- No sólo es necesario el espíritu del voluntario. Todos los preparadores de impuestos voluntarios tienen la obligación de ser Certificados por el IRS.
- Cursos de certificación gratuitos se ofrecerán tardes y / o fines de semana y se empezaran a partir de Diciembre hasta Enero. Se llevan a cabo en varios lugares del Valle.
- Las clases típicamente son de 28-32 horas en total, con la prueba de certificación tomada en línea en el sitio web del IRS durante la clase. Los voluntarios también pueden ser certificados por su cuenta a través del Link & Learn e-learning, que es un programa basado en el proceso de preparación de declaración de impuestos VITA / TCE, encontrado en el sitio web del IRS.

Para mas información contacte a Puja Sachan: [PSachan@TurnANewLeaf.org](mailto:PSachan@TurnANewLeaf.org)

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