

CATHOLIC CHARITIES OF SOUTHEAST TEXAS
in partnership with
LAMAR UNIVERSITY COMMUNITY OUTREACH PROGRAM
IS LOOKING FOR VOLUNTEERS FOR THE
Volunteer Income Tax Assistance Program
(VITA)

Contact: Stephanie Lundgreen at (409) 924-4400 or
slundgreen@catholiccharitiesbmt.org

Instructor

- Provide basic classroom training for new volunteers using IRS training material and tax preparation software.
- IRS will help you get certified.

Note: CPE credit may be available for CPAs and Enrolled Agents

Tax Preparer

- Prepare tax returns for low income individuals and families—especially those eligible for the Earned Income Tax Credit, elderly, non-English speaking and disabled individuals.
- Basic computer skills for using tax preparation software required.
- Successfully complete a training program, either in a classroom setting or by self study and pass an open book test with 80% accuracy or above.

Note: CPE credit may be available for CPAs and Enrolled Agents.

Receptionist/Greeter

- Ability to welcome taxpayers with a customer-friendly attitude.
- Assist clients with the completion of an intake form
- Organize taxpayer information to determine readiness to file a tax return (e.g. taxpayer has his/her ID, W-2 forms, Social Security cards, etc.).
- Manage waiting lists and direct taxpayers to other sites, if necessary.
- Provide information to taxpayers about financial education workshops, if available.

Technical Back-Up

- Provide assistance to volunteer tax preparers with software, hardware, or other technology problems.
- Must receive short training on e-file software and VITA procedures.

Clerical

- Basic office skills required
- Basic computer skills required

Volunteer Income Tax Assistance (VITA) Program

Volunteer Interest Form

Each volunteer will be required to attend a training session conducted by Internal Revenue Service Staff. Each volunteer will receive a certificate of completion from the Internal Revenue Service. Those with tax preparation experience or tax law knowledge can do self-study for certification.

Catholic Charities of SETX will host a Community Tax Center at its Central Service Facility located at 2780 Eastex Freeway in Beaumont, Texas.

Volunteers will be needed on any or all Monday evenings from Feb. 6 thru Apr. 14, 2012 from 5 until 7.

First Name:	Last Name:
Mailing Address:	
City, State, Zip:	
Telephone:	Email:

Are you a returning VITA volunteer? YES NO If yes, how many years? ____

Are you comfortable using computers? YES NO

For which position(s) would you like to volunteer?			
<input type="checkbox"/> Tax Preparer	<input type="checkbox"/> Administrative Assistant	<input type="checkbox"/> Interpreter	<input type="checkbox"/> Site Coordinator
<input type="checkbox"/> Instructor	<input type="checkbox"/> Quality Reviewer	<input type="checkbox"/> Greeter	<input type="checkbox"/> Computer Specialist

Indicate if you are a CPA or Enrolled Agent CPA ENROLLED AGENT

Languages spoken other than English: _____

Additional skills or comments: _____

Training will be held at Lamar University Downtown Beaumont. Please indicate which training session you can attend.	
<input type="checkbox"/> January 14, 2012	9 AM to 1 PM
<input type="checkbox"/> January 21, 2012	9 AM to 1 PM

PLEASE RETURN COMPLETED FORM
By **EMAIL** to Stephanie Lundgreen at slundgreen@catholiccharitiesbmt.org or **FAX** to 409-832-0145.

Thank you for your interest in supporting the VITA Program!