

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: Matt Hopson at (409) 924-4425 or

mhopson@catholiccharitiesbmt.org

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

Each volunteer will be required to obtain a certificate of completion from the Internal Revenue Service (IRS). Training classes will be offered or those with tax preparation experience or tax law knowledge may be able to 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 are needed on Mondays, February 6, 2017 thru April 10, 2017 (Closed April 3, 2017) from 5 PM until 8 PM.

Volunteer Income Tax Assistance (VITA) Program Volunteer Interest Form

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"/> Receptionist/Greeter	<input type="checkbox"/> Interpreter	<input type="checkbox"/> Site Coordinator
<input type="checkbox"/> Quality Reviewer	<input type="checkbox"/> Administrative Assistant	<input type="checkbox"/> Technical Back-Up	<input type="checkbox"/> Clerical

What dates are you available to volunteer?

February 6 February 13 February 20 February 27

March 6 March 13 March 20 March 27 **Closed April 3** April 10

I would like to volunteer at another location on Saturdays.*

**Please note your application will be given to the Site Coordinator for this VITA location.*

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

Languages spoken other than English: _____

Trainings will be held at **Galloway Hall Lamar Campus Room 245**. Please indicate the training session(s) you can attend.

<input type="checkbox"/> January 14, 2017 9 AM to 3 PM Review training material, Standards of Conduct, Intake/Interview certifications, tax law changes and review ACA requirements
<input type="checkbox"/> January 21, 2017 9 AM to 3 PM Completing basic certification including software training with certification scenarios
<input type="checkbox"/> January 28, 2017 9 AM to 3 PM Additional TaxSlayer software training with scenarios

PLEASE RETURN COMPLETED FORM
By **EMAIL** to Matt Hopson at mhopson@catholiccharitiesbmt.org or **FAX** to 409-832-0145
Thank you for your interest in supporting the VITA Program!