



Community Action Duluth

# tax volunteer FAQ

## Volunteers' Frequently Asked Questions

### **What is Community Action Duluth?**

Community Action Duluth is a nonprofit organization dedicated to eliminating poverty. One of our programs is to provide tax preparation assistance to families and individuals with limited resources. Dedicated and skilled volunteers provide the majority of our tax site services. This program is a partnership with AccountAbility Minnesota, a state-wide organization. Last year Community Action Duluth assisted 1,618 households in claiming \$3.1 million in tax refunds!

### **Who will I be helping?**

Community Action Duluth provides free tax preparation services for individuals and families with income under \$49,000. The average income of our customers in 2011 was \$14,620, and 20% of our customers were people of color. We serve many seniors, people with disabilities, and people who live in group homes or adult foster care. Our clients generally do not have access to affordable, professional tax preparation.

### **What will I do if I prepare taxes?**

Under the supervision of a site manager, you will prepare federal, state and property tax returns for tax year 2011. Experienced tax preparation volunteers, Community Action Duluth staff, and the site manager are available to assist you and to review your work.

### **What will I do if I do not prepare taxes?**

There are many other opportunities to help. Site assistants greet our customers and sign them in. They meet individually with each person to review their income forms, verify their identification documents and complete the intake process. Assistants also assemble completed tax returns to provide clients with their own hard copies.

### **What difference will I make?**

One hour of your time can put an average of \$2000 in the pockets of low-income families and individuals. You will help our clients claim refundable tax credits such as the Earned Income Tax Credit (EITC) and the Minnesota Working Family Credit. These credits can be received even if a person owes no tax. Taxpayers may also be able to utilize child tax credits and education credits to offset their tax bill. Every volunteer on our team plays a crucial role, and your participation at the tax site can help boost a person's annual income by as much as 50%.

### **Do I have to be a tax professional to help?**

NO. Volunteers receive all training necessary for their position. A background in tax preparation or experience in preparing your own personal return is helpful but not required.

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## What specific training will I receive?

A new tax preparer completes 11-14 hours of IRS-certified training in January prior to working at a site. Experienced volunteers take a refresher course to get updates on the most current and relevant changes to state and federal tax law. Training and practice in using the tax preparation software is also provided. All volunteer preparers, reviewers and assistants will view a presentation on tax site ethics and confidentiality (new this year).

## Do we file the returns for clients?

*For Electronic Filing (e-File):* YES. We complete the electronic filing of federal, state and property tax returns at our office. We provide taxpayers with one free paper copy of each return we file for them.

*For Paper Filing:* NO. We provide the taxpayer with one copy each of the federal, state and/or property tax return and addressed envelopes for filing the returns. For each payment due, we also provide a payment voucher and mailing envelope. The taxpayer is responsible for mailing in the return(s).

## Are we liable if we make a mistake with a client's return?

NO. We participate in the IRS Volunteer Income Tax Assistance (VITA) program. We take the information that the individuals provide and complete the tax returns to the best of our abilities. All tax returns are reviewed by an experienced tax preparer certified to be a reviewer, ensuring the highest accuracy of the return prior to giving it to the client. We do not sign the tax return but indicate a VITA program number on the return.

## Do I need to bring anything to the tax site?

No, although you may prefer to bring your own calculator, pen or pencil, and training resource materials to reference at the site. You will be provided with resource materials at your first training session.

## What should I wear to the tax site?

Casual dress is fine. Please be respectful of the clients, other volunteers and the agency. Remember you are a representative of Community Action Duluth to the public, the clients, volunteers and the community agency.

## What if I know an organization interested in getting more information or seeing a presentation about volunteering at the tax site?

Contact Community Action Duluth at (218) 726-1665 or by email at [mail@communityactionduluth.org](mailto:mail@communityactionduluth.org). We would be happy to talk with you about volunteer opportunities.

## How do I get more information about volunteering at Community Action Duluth?

Again, contact us at (218) 726-1665 or by email at [mail@communityactionduluth.org](mailto:mail@communityactionduluth.org). We would be happy to talk with you about volunteer opportunities or answer specific questions.

One Hour OF YOUR TIME CAN PUT \$2,000 INTO A LOW-INCOME HOUSEHOLD

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