



Tax Site Volunteers' Frequently Asked Questions

What is Community Action Duluth?

Community Action is a nonprofit organization dedicated to eliminating poverty. One of our projects is to provide tax preparation assistance to individuals and families with limited resources. Dedicated and skilled volunteers provide the majority of our services. This project is a partnership with AccountAbility MN, a state-wide organization. Last year Community Action Duluth assisted 871 households to claim over \$1,275,119 in tax refunds!

Who will I be helping?

Community Action Duluth provides free tax preparation services for households with incomes under \$39,000. The 2008 average adjusted gross income of our customers at the main, Community Action Duluth office site was \$14,127.05 while it was \$15,293.67 at our second site at Memorial Park. 20% of our customers were people of color. We serve many seniors and people who live in group homes. Our clients generally do not have access to affordable, professional tax preparation.

What will I do? One of the following:

- 1. Tax Preparer:** Under the supervision of a site manager, you will prepare federal, state and property tax returns for the current year. Experienced tax preparation volunteers and the site manager are available to assist you and review your work. Some clients may have previous years' tax return and/or amended returns to complete.
- 2. Tax Site Assistant:** There are several positions under this description; 1) greet our customers and sign them in, 2) meet individually with each person to review their forms and complete an intake process, 3) make copies of the tax returns and give clients their tax returns after completion, 4) other duties as assigned.
- 3. Benefit Screener:** Volunteers also screen our customers using a web-based tool to determine if they are eligible for programs such as energy assistance, child care subsidies, or health coverage.

What difference will I make?

One hour of your time can help put \$2,000 in the pockets of a low-income family. Each volunteer contributes to assisting low-income families and individuals by helping them to claim refundable tax credits such as the Earned Income Tax Credit (EITC) and the 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. You can help boost a person's annual income as much as 50%.

Do I have to be a tax professional to prepare taxes?

NO. Experienced tax professionals train all volunteers in tax preparation. A basic background in tax preparation is helpful but not required. A new volunteer will complete 11– 14 hours of

training prior to working at a site. The training is scheduled in January each year. Experienced volunteers complete tax update training each year to receive the most current changes on taxes.

What specific training will I receive?

Community Action Duluth provides training for all volunteers. First-year tax preparation volunteers must attend State Tax Training and Federal Tax Training. Experienced volunteers participate in a Tax Update training session. In addition, all volunteers participate in practice labs prior to volunteering at a tax site. Site assistants also attend training in January.

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

NO. We participate with 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 a tax reviewer to ensure 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 site?

YES if you are preparing taxes, you should bring a calculator, pencil and your training resource materials with you to the site. You will be provided with training resource materials at your first training session. These are good resources to have available.

What should I wear to the tax site?

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

What if I have an organization that might be interested in getting more information or having a presentation made about volunteering?

Contact Angie Miller at Community Action Duluth at 726-1665 extension 13. We would be happy to make a presentation and/or have our display at an organization's event.

How do I get further information?

Contact Angie Miller at Community Action Duluth at 726-1665 extension 13. We would be happy to talk with you about volunteer opportunities.

Do I need to bring food with me?

Community Action Duluth provides pizza or subs during the evening tax sessions and pastries for the Saturday tax sessions. You are welcome to bring food for the volunteers also!

**THANK YOU FOR SERVING THE COMMUNITY THROUGH
COMMUNITY ACTION DULUTH.**

Angie Miller 726-1665 extension 13

19 North 21st Avenue West

Duluth, MN 55806

e-mail angie@communityactionduluth.org

Community Action Duluth Website

www.communityactionduluth.org