

VITA / TCE

- The Internal Revenue Service sponsors the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs.
- **VITA** originated with the Tax Reform Act in 1969 as part of the increased emphasis on taxpayer education and is designed to help low and moderate-income taxpayers complete their annual tax returns at no cost.
- **TCE** offers FREE tax counseling and basic income tax return preparation to individuals aged 60 or older and originated in 1978 with the Revenue Act of 1978.
- Trained community volunteers help with special credits, such as Earned Income Tax Credit, Child Tax Credit, and Credit for the Elderly or the Disabled.
- Most sites also offer free electronic filing (e-filing).
- Individuals taking advantage of the e-file program receive their refunds in half the time compared to returns filed on paper – even faster when tax refunds are deposited directly into one's bank account.

Volunteer Income Tax Assistance Program

- Offers free tax help to low- to moderate-income (generally, \$50,000 and below) people who cannot prepare their own tax returns
- Certified volunteers sponsored by various organizations receive training to prepare basic tax returns in communities across the country
- VITA sites are generally located at community and neighborhood centers, libraries, schools, shopping malls, and other convenient locations
- Most locations also offer free electronic filing
- To locate the nearest VITA site, call 1-800-906-9887 or go to www.irs.gov, type the word “VITA” in the search engine and click on “Free tax return preparation for you by volunteers”. The “Find a VITA site near you” link will take you to an application to help you locate a free tax preparation site near your zip code.

Tax Counseling for the Elderly

- Provides free tax help to people aged 60 and older.
- Trained volunteers from non-profit organizations provide free tax counseling and basic income tax return preparation for senior citizens.
- Volunteers who provide tax counseling are often retired individuals associated with non-profit organizations that receive grants from the IRS.
- As part of the IRS-sponsored TCE Program, AARP offers the Tax-Aide counseling program at more than 7,000 sites nationwide during the filing season. Trained and certified AARP Tax-Aide volunteer counselors help people of low-to-middle income with special attention to those age 60 and older.
- To locate the nearest AARP Tax-Aide site, call 1-888-227-7669 or visit AARP's website at www.aarp.org/money/taxes/aarp_taxaide/

Volunteers Needed!

- Willingness to help others
- Detail oriented / Takes pride in performing tasks completely and accurately
- Friendly, dependable and flexible
- Able to interact with the public in a professional manner
- Complete Volunteer Standards of Conduct Training (i.e. Ethics training) – all volunteers
- Complete tax law proficiency training to prepare income tax returns
- Roles: Tax preparer, Screener, Translator, Quality Reviewer, Site Coordinator, Tech Support, e-File Transmission Specialist

How to Volunteer

- VITA
 - Submit your contact information using the VITA/TCE Volunteer Sign Up - Form 14310. Include your contact information and the city and state where you want to volunteer. Your information will be forwarded to the sponsoring partners in your area for further contact.
 - <http://www.irs.gov/pub/irs-pdf/f14310.pdf>
- TCE / AARP
 - http://www.aarp.org/money/taxes/info-2006/volunteer_aarp_tax_aide.html

Items to Bring to the VITA/TCE Site to Have Your Tax Return Prepared

- Proof of identification (Gov't issued picture Id)
- Social Security Cards for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration
- Individual Taxpayer Identification Number (ITIN) assignment letter for you, your spouse and dependents
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statement(s) Form W-2, W-2G, 1099-R, from all employers/payers
- Interest and dividend statements from banks (Forms 1099)
- A copy of last year's federal and state returns if available
- Proof of bank account routing numbers and account numbers for Direct Deposit, such as a blank check
- Total paid for daycare provider and the daycare provider's tax identifying number (provider's SSN or the provider's business Employer Identification Number)
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms