

Pro Bono Opportunity –Chase VITA Project

What is VITA?

The VITA Project is in part an anti-poverty effort and in part a regulatory compliance exercise.

As VITA volunteers, you will be assisting low-income taxpayers in our Northern Kentucky community e-file their federal and state tax returns.

Most taxpayers you will be helping will receive tax refunds, either due to over withholding or because they are eligible for assistance through a variety of federal support programs, such as the Child Tax Credit, the Earned Income Tax Credit (EITC), and the Educational Tax Credit, to name a few.

Level of Commitment

Volunteers are asked to commit to a site and participate as much as possible throughout the 11-week filing season. While not all will be able to work every week, we hope that volunteers will commit to somewhere around 70% of that time.

In Volunteering You Will Have an Impact in Your Community

In participating, you will be involved in implementing public policy and a public project (such as federal family support programs and the federal economic stimulus program) all the while helping those in poverty achieve self-sufficiency.

In volunteering, you will also be participating in community governance. As volunteers, you will be building a community both with those in your midst who are in need of tax assistance (important in an era when more and more public benefits, projects and support programs are available only by filing a tax return) and amongst yourselves, all the while aspiring to the ideal of pro bono service in a public cause and to a vision of professionalism that places civic participation at its core.

You will Learn a Lawyering Skill

VITA is a clinical experience and a transactional learning experience. You will be reporting on a closed transaction, the taxable year. VITA will offer you the opportunity to work on and hone your interviewing skills, your processing skills, and your analytical skills in applying a statutory structure to nuanced fact patterns involving low-income taxpayers. Thus, by volunteering, you will learn valuable lawyering skills. Your VITA experience will also help reinforce the critical role of judgment and professionalism in any legal endeavor.

TRAINING

Experience in tax preparation is not a prerequisite. Willingness to help and to get involved is all that is needed. We will provide all the training you will need (on the tax law and the tax filing software) to enable you to participate successfully. New volunteers will be paired up with returning volunteers as much as possible during the filing season, thus helping the transition to experience.

Volunteers: (i) will need to learn the tax law and certify via a test administered by the IRS and (ii) will need to learn the tax filing software.

Training sessions are held each January. The training session consists of in-class training on the law and the tax software. Volunteers need only attend one training session.

Certification Test

In order to help as a tax preparer, all volunteers will need to certify by taking an on-line test administered by the IRS. While all volunteers will need to certify at the Basic Level at the minimum, we will urge all of you to go beyond and certify at the Intermediate Level, and even the Advanced Level.

For more information or to volunteer, contact:

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