



Getting Involved with VITA

A Volunteering Guide for
Financial Institution Employees

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What is VITA?

Overview

Volunteer Income Tax Assistance (VITA) sites provide free tax preparation assistance for taxpayers who qualify. The sites, located in communities all across Texas and the United States, assist low- and moderate income working Americans with preparing their yearly tax filings at no cost to the taxpayer.

Tax Credits and Other Services

In addition to sparing low- and moderate income Americans from expensive tax preparation fees, VITA sites also help taxpayers claim tax credits for which they qualify, such as Earned Income Tax Credit (EITC), Child Tax Credit (CTC) and others. The tax credits return dollars back to taxpayers and to local economies. Some VITA sites offer additional services to taxpayers, such as financial education or financial coaching.

Volunteer Opportunities

VITA sites are often operated by a local United Way, another nonprofit organization or a local community tax coalition. VITA sites rely upon dedicated volunteers to operate the sites and actually provide the free tax preparation to taxpayers. VITA sites offer a variety of exciting and rewarding volunteer opportunities for those who are interested in getting involved. A VITA site's success at serving taxpayers is dependent upon the number of volunteers they have to help carry out the site's services.

5 Reasons to Volunteer with VITA

It's easy.

Your VITA site coordinators aim to make your volunteer experience as simple and easy as possible. Your volunteer commitment will be approximately three (3) hours once a week and you will be provided all the training you need before you begin working at the VITA site.

It's rewarding.

As a VITA volunteer, you provide a critical service to help low- and moderate income families keep more of what they earn. Each hour you spend volunteering at the VITA sites creates great impact both in the lives of the VITA clients and in positive economic return for your community.

It's fun!

Your volunteer experience is guaranteed to be exciting and fun, with the opportunity to interact with individuals of all backgrounds.

It's an opportunity to cultivate relationships within the community.

Volunteering with VITA will provide you with an opportunity to build relationships with potential future customers and be a brand ambassador for your financial institution. As a financial institution employee, your knowledge and ability to communicate financial information to others is a valuable skill set that would be very useful for a VITA site.

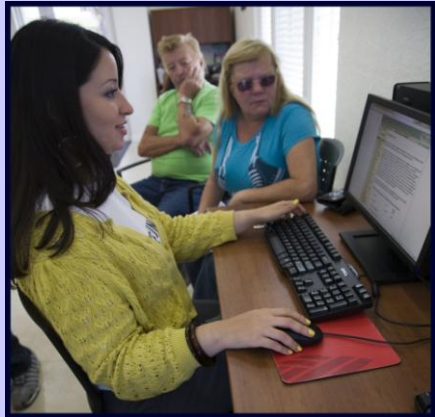
VITA sites need you!

VITA sites rely upon dedicated and passionate volunteers to carry out the VITA sites' important work. The more volunteers a VITA site has, the more community members it can serve!

Volunteer Opportunities

VITA sites offer a variety of opportunities for individuals to get involved. Volunteering is easy, rewarding and fun! As a financial institution employee, your financial knowledge can be very useful in a VITA volunteer role.

Below is a list of potential volunteer roles at a VITA site. However, each VITA site operates a little differently than the next, so your VITA site may have additional specialized roles such as financial advisor, asset building specialist, savings advisor and more! Ask your site coordinator for more details.



Site Coordinator – These volunteers oversee all the operations at the VITA site, and are often in charge of completing reporting requirements to the organization that operates the VITA site.

Greeters – These volunteers greet and welcome all taxpayers to the VITA site as they walk in the door.

Intake Specialists – These volunteers meet with taxpayers before the taxpayer has his or her taxes prepared. They ensure that the taxpayer fills out necessary intake paperwork and has brought proper documentation and forms.

Tax Preparer – These volunteers sit down with taxpayers and help prepare tax returns.

Quality Reviewers – These volunteers check the accuracy of all tax returns prepared at the VITA site. They also serve as a reference point if taxpayers or tax preparers have technical or tax-related questions.

Transmitters – These volunteers are responsible for transmitting all the information from the completed tax returns to the IRS. Often this role is combined with another role, such as Site Coordinator or Quality Reviewer.

Translators – These volunteers provide language translations for taxpayers and other volunteer roles throughout the tax preparation process.

Volunteer Training

All volunteers are provided free training by the VITA site. Some volunteer roles at the VITA site, such as tax preparers, site coordinators and quality reviewers, require specialized certification from the Internal Revenue Service (IRS). Certification ensures that you are qualified to help others at the tax site. VITA sites help new volunteers to study for and complete the certification exam, either online or through in-person training.

Many other volunteer roles require little to no formal certification by the IRS but are critical to the VITA site operation, such as greeters or translators. If you are interested in one of these roles, your VITA site will train you in what you need to know.

Volunteer Commitment

Each VITA site has different specific expectations for their volunteers. However, VITA site volunteers can expect to volunteer for approximately three (3) hours per week. VITA sites are typically operational from January until April each year, but some VITA sites remain open year-round.

How to Get Involved



Getting involved in your VITA site is easy! Simply visit http://raisetexas.org/assets_building_db/search/ and type in your zip code to locate your nearest local VITA site. From there, you can contact the nearest VITA site to learn more and find local volunteering opportunities!



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