

Organization Name

Volunteer Income Tax Assistance (VITA) Program

Taxpayer Requirements

Clients MUST bring the following documents to prepare tax returns:

- Social Security cards or ITINs for each member of the family
- California ID or Driver's License
- Copy of their 2010 Tax Return (Form 1040, 1040A or 1040EZ)
- All W-2 forms for each member in the family (No check stubs allowed)
- All 1099 and 1098 forms for each member in the family
- Name, Tax Identification Number, address, and phone number of the child and/or dependent care provider for the Child & Dependent Care Credit
- County property tax statements or Form 1098 for mortgages with escrow account to claim property tax deduction
- HUD-1 Settlement Statement for homebuyers
- Receipts for home energy improvements to claim Residential Energy Credit
- Bank account and routing number to use for direct deposit of refunds

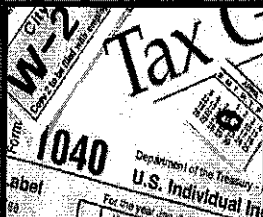
Other Requirements:

- Family income must be below \$50,000 a year
- Both spouses must be present to e-file as Married Filing Jointly
- Taxpayers itemizing deductions and claiming small business expenses must add up all expenses prior to having their returns prepared

We DON'T provide the following services:

- We will not prepare tax returns that include the following forms of income:
 - Sale or rental of a home
 - Self-employment income with expenses greater than \$5,000
 - Capital gains/losses
 - Cancellation of debt
- Assistance with Form W-7 Request for Individual Taxpayer Identification Number (ITIN)

**For specific questions about your income tax requirements, please
call the IRS Hotline at 1-800-829-1040.**



Organization Name

Programa de Asistencia Voluntaria de Ayuda con Impuestos (VITA)

Requisitos Para Participantes

Los participantes deben traer los siguientes documentos a su cita para poder hacer una declaración de impuestos:

- Tarjetas de Seguro Social Para todos los miembros de la familia a quien van a incluir en la declaración
- Identificación de California o Licencia de manejar de California
- Copia de su Declaración de Impuestos del 2010
- Todas las formas W-2 para cada miembro de la familia que trabajo (No podemos aceptar últimos talones de cheques de sus patrones)
- Todas las formas 1099 y 1098 para cada miembro de la familia
- Nombre, numero de identificación de impuestos, domicilio, y numero de teléfono de cuidado de niños o dependientes para calificar para el Crédito de Cuidado de Niños y Dependientes
- Declaraciones de la contribución territorial del condado para reclamar la deducción de contribuciones (esta información se encuentra en la Forma 1098 para hipotecas con cuenta de fideicomiso)
- HUD-1 declaración de establecimiento para compradores de casa
- Recibos de mejoramientos de casa para calificar para el Crédito de Energía Residencial
- Información de su Institución Bancaria si usted quiere que su reembolso de declaración de impuestos sea enviado directamente a su cuenta

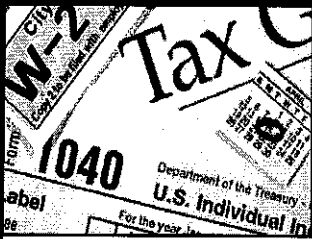
Otros Requisitos:

- Para participar en nuestro programa la familia debe tener ingresos menores de \$50,000 al año.
- Si su declaración es de Matrimonio Declarando Unidos– deben venir las dos personas
- Personas reclamando deducciones para gastos de negocios, casas, médicos, o donaciones tienen que sumarlos antes de que CSET pueda preparar su declaración.

No Proveemos estos servicios:

- No prepararemos forma W-7 Solicitud del Número de Identificación del Contribuyente
- No prepararemos declaraciones que incluyan las siguientes formas de ingreso:
 - Venta o renta de una casa
 - Ingresos de negocio mayores de \$5,000
 - Ganancias/Perdidas Captales
 - Cancelación de deuda

Para mas información sobre las reglas de impuestos de ingresos, deben llamar a IRS a 1-800-829-1040.



Organization Name

**Volunteer Income Tax Assistance
(VITA) Program**

**FREE Income Tax Return Preparation
& Electronic Filing!**

for Families with Income below \$50,000



Claim All the Tax Credits Available:

Earned Income Credit (up to \$5,751)

Child Tax Credits (up to \$1,000 per child)

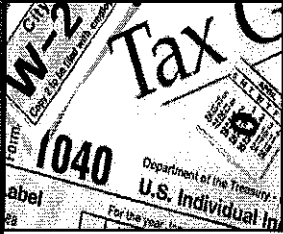
Receive Your Refund within 5 to 10 Days!

for Taxpayers who E-File and Request Direct Deposit

Community	Location	Schedule	Appointments
Visalia	Visalia CSET 312 NW 3rd Ave. Visalia 93291	Thursday: 5pm to 8pm (Appointments Only) Saturday: 10am to 3pm (Walk-ins Only)	(559) 555-4640 No appointments on Saturday
Tulare	Tulare CSET 115 E. Tulare Ave. Tulare 93274	Wednesdays: 5pm-8pm (Appointments Only) Saturday: 10am to 3pm (Walk-ins Only)	(559) 555-4640 No appointments on Saturday
Porterville	Porterville CSET 1061 W. Henderson Porterville 93257	Friday: 5pm to 8pm (Appointments Only) Saturday: 10am to 3pm (Walk-ins Only)	(559) 555-1440 No appointments on Saturday
Orosi	Orosi CSET 12384 Avenue 416 Orosi 93647	Saturday: 10am to 3pm (Walk-ins Only)	Information Line: (559) 555-1095

Services available from February 1st to April 15.

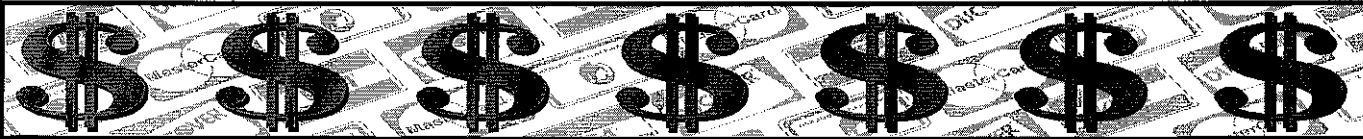
**For guidance about your personal income tax situation,
please call the IRS Taxpayer Hotline at 1-800-829-1040**



Organization Name

**Programa de Asistencia Voluntaria
de Ayuda con Impuestos (VITA)**

**GRATIS Preparación de Regreso de
Impuestos y E-File
para familias con ingresos menos de \$50,000**



Reclame todos los créditos fiscales disponibles:

Crédito por Ingresos de Trabajo (hasta \$5,751)

Crédito Fiscales por Hijo(a)s (hasta \$1,000 por cada hijo)

¡Reciba su reembolso rapido- 5 a 10 días!

Para pagadores de impuestos que usan E-File y Depósito Directo

Comunidad	Dirección	Horario	Citas
Visalia	Visalia CSET 312 NW 3rd Ave. Visalia 93291	Jueves: 5pm a 8pm (Solo Citas) Sábado: 10am a 3pm (No hay citas)	(559) 555-4640 No habrá citas los sábados
Tulare	Tulare CSET 115 E. Tulare Ave. Tulare 93274	Miércoles: 5pm-8pm (solo Citas) Sábado: 10am a 3pm (No hay citas)	Línea de información: (559) 555-1987
Porterville	Porterville CSET 1061 W. Henderson Porterville 93257	Viernes: 5pm a 8pm (Solo Citas) Sábado: 10am a 3pm (No hay citas)	(559) 555-1440 No habrá citas los sábados
Orosi	Orosi CSET 12384 Avenue 416 Orosi 93647	Sábado: 10am a 3pm (No hay citas)	Línea de información: (559) 555-1095

Servicios disponibles 1 de febrero hasta el 15 de abril

Para guía sobre su situación personal de impuestos de ingreso,
favor de llamar al IRS al 1-800-829-1040

AGENDA
VITA Tax Preparer Training (Day 1)
January 8, 2011

Topic	Chapter	Teaching Time	Start Time	End Time
Lesson 1: Welcome & Introductions VITA Overview	1	90 min	9:00 AM	10:30 AM
Break		15 min	10:30 AM	10:45 AM
Lesson 2: Screening & Interviewing	2	30 min	10:45 AM	11:15 AM
Review & Complete Form 13614 from the Basic Comprehensive Problem A – Bennett		15 min	11:15 AM	11:30 AM
Lesson 3: Filing Basics	3	30 min	11:30 AM	12:00 PM
Lunch		30 min	12:00 PM	12:30 PM
Lesson 4: Filing Status	4	30 min	12:30 PM	1:00 PM
Lesson 5: Personal Exemptions	5	15 min	1:00 PM	1:15 PM
Lesson 6: Dependency Exemptions	6	30 min	1:15 PM	1:45 PM
Introduction to TaxWise: Open Comprehensive Problem A & Input Information from the Form 13614		60 min	1:45 PM	2:45 PM
Review Online Tools for Tax Law Training and Certification		15 min	1:45 PM	3:30 PM

IRS Link & Learn Taxes: www.irs.gov/app/vita/

TaxWise Practice Lab: www.voltaxprep.com

VITA Volunteer Test Site: <http://linklearn.webtechteam.com>

TaxWise Online: <http://twonline.taxwise.com>

AGENDA
VITA Tax Preparer Training (Day 2)
January 15, 2011

Topic	Chapter	Teaching Time	Start Time	End Time
Welcome & Overview	1	30 min	9:00 AM	9:30 AM
Review: Filing Status & Dependency Exemptions		30 min	9:30 AM	10:00 AM
Lesson 8: Income	8	30 min	10:00 AM	10:30 AM
Break		15 min	10:30 AM	10:45 AM
Lesson 17: Adjustments to Income	17	30 min	10:45 AM	11:15 PM
Lesson 19: Standard Deduction & Tax Computation	19	15 min	11:15 AM	11:30 AM
Start Computer Exercise (Problem A): Input Forms W-2, Form 1099-INT, interest income, Form 1099-G and W-2G		30 min	11:30 AM	12:00 PM
Lunch		30 min	12:00 PM	12:30 PM
Complete Computer Exercise (Problem A): Input Forms W-2, Form 1099-INT, interest income, Form 1099-G and W-2G		30 min	12:30 PM	1:00 PM
Lesson 23: Credit for Child & Dependent Care Expenses	23	15 min	1:00 PM	1:15 PM
Lesson 24: Education Credits	24	15 min	1:15 PM	1:30 PM
Lesson 26: Child Tax Credits	26	15 min	1:30 PM	1:45 PM
Lesson 27: Miscellaneous Credits	27	15 min	1:45 PM	2:00 PM
Break		15 min	2:00 PM	2:15 PM
Computer Exercise (Problem A): Complete Tax Credit Worksheets		45 min	2:15 PM	3:00 PM

IRS Link & Learn Taxes: www.irs.gov/app/vita/
TaxWise Practice Lab: www.voltaxprep.com
VITA Volunteer Test Site: <http://linklearn.webtechteam.com>
TaxWise Online: <http://twonline.taxwise.com>

AGENDA
VITA Tax Preparer Training (Day 3)
January 22, 2011

Topic	Lesson	Teaching Time	Start Time	End Time
Welcome & Introductions		15 min	9:00 AM	9:15 AM
Review: Income & Credits		30 min	9:15 AM	9:45 AM
Lesson 29: Payments	29	15 min	9:45 AM	10:00 AM
Lesson 30: Earned Income Credits	30	30 min	10:00 AM	10:30 AM
Break		15 min	10:30 AM	10:45 AM
Computer Exercise (Open Problem A): Complete EIC Worksheets		30 min	10:45 AM	11:15 AM
Lesson 31: Refund/Amount of Tax Owed	31	30 min	11:15 AM	11:45 AM
Computer Exercise: Discuss Diagnostic, Printing & signing the Return		30 min	11:45 AM	12:15 PM
Lunch		30 min	12:15 PM	12:45 PM
Lesson 32: Quality Review of Tax Return	32	30 min	12:45 PM	1:15 PM
Paperwork Retained		30 min	1:15 PM	1:45 PM
Break		15 min	1:45 PM	2:00 PM
Computer Exercise (Problem A): Finish tax return		30 min	2:00 PM	2:30 PM
Review Customer Flow in VITA Sites		30 min	2:30 PM	3:00 PM

IRS Link & Learn Taxes: www.irs.gov/app/vita/

TaxWise Practice Lab: www.voltaxprep.com

VITA Volunteer Test Site: <http://linklearn.webtechteam.com>

TaxWise Online: <http://twonline.taxwise.com>

AGENDA
VITA Tax Preparer Training (Day 4)
January 29, 2011

Topic	Lesson	Teaching Time	Start Time	End Time
Welcome & Introductions		15 min	9:00 AM	9:15 AM
Completing California State Tax Return		90 min	9:15 AM	10:45 AM
Break		15 min	10:45 AM	11:00 AM
Computer Exercise (Problem A): Complete CA Form 540		30 min	11:00 AM	11:30 AM
Computer Assignment 1: Start		30 min	11:30 AM	12:00 PM
Lunch		30 min	12:00 PM	12:30 PM
Computer Assignment 1: Complete		30 min	12:30 PM	1:00 PM
Computer Assignment 2		45 min	1:00 PM	1:45 PM
Start VITA Volunteer Certification Exam		75 min	1:45 PM	3:00 PM

IRS Link & Learn Taxes: www.irs.gov/app/vita/

TaxWise Practice Lab: www.voltaxprep.com

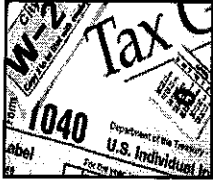
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TaxWise Online: <http://twonline.taxwise.com>

FREE INCOME TAX RETURN PREPARATION

Get your refund money in 5 to 10 days!

(For taxpayers who e-file and request Direct Deposit)



Your tax credits could include:

- \$5,751 for the Earned Income Credit
- \$1,000 per child for the Child Tax Credit
- Hope, Lifetime, or Advanced Opportunity Education Credits

Services are provided for:

- Tulare County Residents
- Families with income less than \$50,000

STARTING FEBRUARY 1, 2012

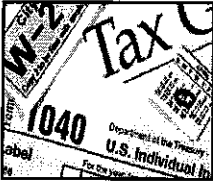
All Services are offered **FREE OF CHARGE** at the following locations

Visalia	Tulare	Porterville	Orosi
312 NW 3rd Avenue Visalia, CA 93291 (559) 741-4640	115 E. Tulare Ave Tulare, CA 93274 (559) 684-1987	1061 W. Henderson Porterville, CA 93257 (559) 788-1440	12384 Ave 416 Orosi, CA 93647 (559) 582-1095
Thursday: 5pm-8pm Appointments only Saturdays: 10am-3pm Walk-ins only	Wednesday: 5pm-8pm Appointments only Saturdays: 10am-3pm Walk-ins only	Fridays: 5pm-8pm Appointments only Saturdays: 10am-3pm Walk-ins only	Saturdays: 10am-3pm Walk-ins only

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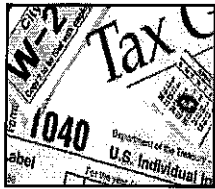
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GRATIS Preparación de Regreso de Impuestos



Reciba su reembolso rápido—5 a 10 días!

(Para pagadores de impuestos que usan e-file y Deposito Directo)

Los créditos fiscales disponibles:

- \$5,751 Crédito por ingresos de trabajo
- \$1,000 Crédito fiscales por hijo(a)s
- Créditos de educación

Estos servicios estarán disponibles:

- Residentes del condado
- Familias con ingresos menos de \$50,000

Comenzando el 1 de Febrero del 2012

Todos los servicios serán **GRATIS** en las siguientes comunidades

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Make a
difference!

Earn It!
Keep It!
Save It!



Volunteer today!

Join the movement of 3,000+ volunteers.

Help our community get the tax refunds we deserve. Volunteer with the Bay Area's largest coalition of free tax preparation sites for low-income residents.

Last year, volunteers helped bring back \$63.8 million in refunds to our community!

Lend a hand at a Bay Area location near you as a:

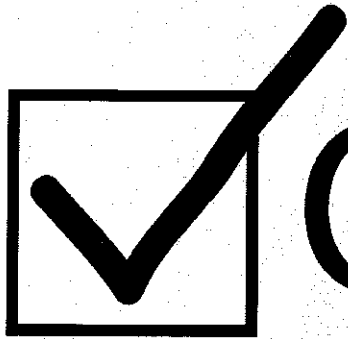
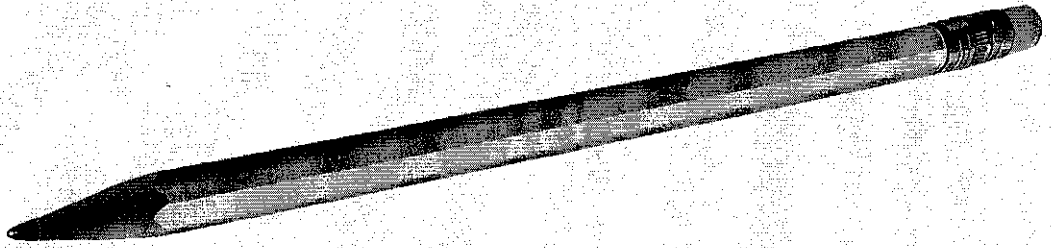
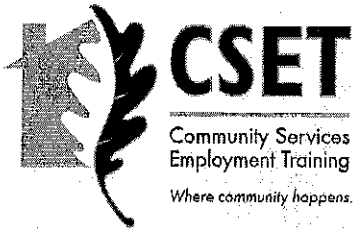
- **Tax preparer:** No experience necessary - receive free IRS training and certification!
- **Greeter:** welcome clients and ensure they have the proper documentation
- **Interpreter:** all languages needed especially Spanish and Chinese

www.earnitkeepsaveit.org or call 211



**EarnIt!
KeepIt!
\$aveIt!**





OLUNTEER

Working families need your help!

Become a volunteer income tax preparer

CSET operates the Voluntary Income Tax Assistance Program(VITA), which helps low-income families file their tax returns for FREE.



Training for Tax Preparers

All volunteers must attend the first day of training. Volunteer income tax preparers will receive four days of training.

From 8:30 am to 4:00 pm in January

at all the January 7

8:00 am to 4:00 pm

at the following employment connection

22 W. Noble Ave

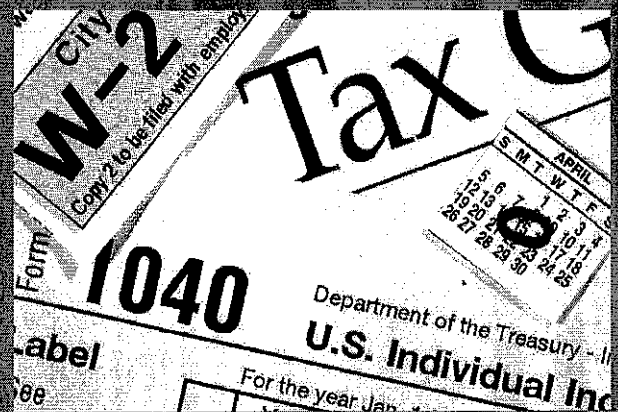
Rocky Hill Employment Connection

106 W. Henderson Ave

or at the UIZ

at 609-732-4100

at www.cset.org



FOR IMMEDIATE RELEASE

Contact: Frank Ruiz

Phone: (559) 741-4640

E-mail: Frank.Ruiz@cset.org

CSET RECRUITING VOLUNTEERS FOR FREE TAX ASSISTANCE PROGRAM

Community Services and Employment Training, Inc. (CSET) is recruiting a team of volunteers to assist with the Volunteer Income Tax Assistance (VITA) program. The VITA program provides free tax preparation and electronic filing services to Tulare County households with less than \$50,000 annual income.

Approximately 150 people are needed to volunteer their time for the VITA program, which runs from February 1 through April 15, 2012. Tax preparation services will be provided in Orosi, Porterville, Tulare and Visalia. Spanish speaking volunteers are greatly needed.

In tax year 2010, CSET's VITA program filed 1,768 tax returns, which brought more than \$3 million back to Tulare County. Volunteers will go through a training course to become a certified volunteer tax preparer. The four week volunteer training begins Saturday, January 7, 2012 from 9am to 4pm and will be held every Saturday in January at the Visalia and Porterville Employment Connections.

This is a high impact volunteer opportunity for civic-minded individuals to assist lower-income families in our communities. It is a great work experience opportunity for high school youth and adults exploring careers in financial services. Retired financial professionals are excellent candidates to volunteer to assist their neighbors.

"The tax assistance provided to Tulare County families would not be possible without the time and dedication of our volunteers," stated Frank Ruiz, CSET Assistant Director of Community Initiatives. "It is because of their valuable contributions that we can provide this high quality tax preparation service to our families."

Funding for VITA is provided by the Tulare County Redevelopment Agency and City of Tulare Community Development Block Grant Program. For more information or to sign up to volunteer for the VITA program, visit www.cset.org or contact Frank Ruiz at (559) 732-4194 or frank.ruiz@cset.org.

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CSET Providing Free Tax Preparation Services

Recent research estimates that Tulare County will miss out on \$33.1 million in economic activity and 166 jobs that could have been generated by the Earned Income Tax Credit (EITC), a refundable tax credit that brings refunds up to \$5,666 to lower income workers. This is because an estimated 18,955 Tulare County residents will fail to claim over \$31 million in EITC refunds each tax season.

Given the potential impact that these unclaimed tax refunds could have on the local economy, the County of Tulare, City of Tulare, Community Trust Credit Union, and United Way will be partnering with Community Service Employment Training (CSET) to prepare free tax returns for taxpayers with incomes less than \$50,000 through the Volunteer Income Tax Assistance (VITA) program.

The estimated loss of tax refunds and economic activity are based on a report Left on the Table, published through a collaboration between the New America Foundation and economists at California State University at Fresno. "We've always known how important these refunds are to California families," said Anne Stuhldreher, a senior research fellow at the New America Foundation. "This report is the first to show how important they are to our local economies. By encouraging people to find out if they're eligible for these refunds, we can give struggling families a financial boost and stimulate the economy at the same time," she said.

"The numbers are very disturbing to us. Tulare County residents were hit especially hard by the recession and unemployment and can really use this financial assistance," said Carolyn Rose, the executive director of CSET.

Eligible Californians are not the only ones who lose when refunds go unclaimed, the report finds. Local businesses and counties also lose out on potential increased revenue and taxes that come from recipients spending their refund.

"We found that the EITC refunds, when spent in California, translate directly and indirectly into economic growth for small businesses that lead to job creation and tax revenue for the state," said Antonio Avalos, report co-author and professor of economics at California State University at Fresno.

Taxpayers can receive free tax preparation services at CSET's four tax sites in Visalia, Porterville, Tulare, and Orosi starting on Thursday, February 3 until Saturday, April 16. All sites will be opened every Saturday during the tax season by walk-in. The Visalia and Porterville sites will be opened on Thursday and Friday nights, respectively, by appointment only.

"We are pleased to offer free tax preparation services to low-income workers this year," said Ms. Rose. "Last year we served over 1,500 taxpayers, and helped them claim almost \$2,800,000 in refunds. We hope to grow that number this tax season."

The EITC is a refundable tax credit that is designed to give a financial boost to working individuals and families. A person must have earned income, not be claimed as a dependent, and meet certain income requirements, along with other qualifications. EITC is widely recognized as one of the federal government's most effective anti-poverty program, lifting millions of low-income families and children out of poverty every year while incentivizing work and stimulating local economies.

Several other credits are available to working families, including the Child & Dependent Care, Higher Education, Retirement Savings, Residential Energy, and Child Tax Credits. The average federal refund was \$1,500 last year.

"We appreciate very much CSET's efforts to ensure that low-income workers in Tulare County file to receive their tax refunds," said Mike Lane, Visalia City Council Member. "This is a critical program for the well-being of families, our communities and the local economy."

Please call CSET at (559) 741-4640 for more information about this free tax preparation service.

The full report is available here:

http://assetsca.newamerica.net/publications/policy/left_on_the_table

