



# Volunteer Application



2011 Volunteer Income Tax Assistance (VITA) Program

The Omaha EITC Coalition needs the assistance of VITA volunteers to help low-income individuals complete their Federal and State income tax returns. The VITA sites are open at various locations within the community from January 24 through April 15, 2011. The site times vary, but many are open evenings and Saturdays.

**If you are interested in volunteering please provide the following information:**

**I am a:**     **Returning Volunteer**     **New Volunteer**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Phone Number (day): \_\_\_\_\_ (evening): \_\_\_\_\_

I speak another language: \_\_\_\_\_

- Yes**, I would like to volunteer for the upcoming tax season.
- No**, I cannot volunteer for the upcoming tax season but would be interested in volunteering at some time in the future. Please keep me on your mailing list.
- No**, I cannot volunteer but know of someone who does. Their contact information is:  
Name \_\_\_\_\_  
Phone Number (day): \_\_\_\_\_ Fax Number: \_\_\_\_\_  
E-mail address: \_\_\_\_\_

**Preferred Volunteer Activity: (check all that apply)**

- Tax Preparer (*Must complete certification training*)
- Navigator (Help with client in-take, surveys, and invite clients to take advantage of educational and asset-building opportunities at the sites)

**We ask for a minimum of 12 hours per month of service.** Most sites operate on shifts of 3 hours.

I prefer: Morning (9am-12noon) \_\_\_\_\_  Weekday  
Afternoon (2pm-5pm) \_\_\_\_\_  Saturday  
Evening (5pm-8pm) \_\_\_\_\_

**Attestation:**

***By my signature below, I attest that I intend to serve as a volunteer upon completion of the training program and that I am not a private or commercial tax preparer. I understand that I will not be compensated for my services, that I cannot solicit compensation and that I will not solicit business from taxpayers I assist or use the knowledge I have gained about them for any direct or indirect personal benefit for me or any other specific individual.***

**Signed:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Training class confirmation and site preference information forms will be sent later.**

Please return form to **Ed Leahy** by fax at (402) 734-8887 or by e-mail to [omahaeitc@cox.net](mailto:omahaeitc@cox.net) or by mail to 3605 Q Street, Omaha, NE 68107



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The Omaha EITC Coalition prepares high quality, accurate tax returns. Through our Tax Preparer Institute, we train volunteers in customer service, computer software, tax law, and effective tax counseling. Volunteers take a three-part exam at the Basic, Intermediate and Advanced levels of tax law and must minimally pass the first two levels with a score of 80% or higher to serve as an IRS-certified tax preparer.

New volunteers are required to take the complete, 54-hour in-person class (offered at a variety of convenient times) between Labor Day and Thanksgiving each year.

Volunteers with 2+ years of experience may elect to self-certify using Link & Learn once every two years, but must apply for this option with the Training Coordinator. Any self-certifying volunteer would be required to attend a three-hour Update Training prior to the start of the tax year.

We encourage experienced volunteers to take expanded Review Course each year to keep their skills sharp and to stay current with the pace of tax law changes.

Since VITA tax advisors help all of our customers free of charge and since we are prohibited from soliciting any other type of business from our customers, our Coalition considers training applicants who intend to use the skills gleaned from our training program to prepare taxes privately or commercially to be in conflict of interest. Therefore, each person enrolling in our tax preparation courses must declare that they agree to serve as a volunteer upon completion of the course for a minimum 12 hours per month during tax season (late January through April 15) and do not intend to work as a private or commercial tax preparer in the current season by signing a statement on the Volunteer Application.

**2010-2011 Tax Law Courses:**

September 27-November 19	Complete Tax Law Courses
November 8-19	Returning Volunteer Course
December 1-21	Advanced Volunteer Course

**2010-2011 Navigator Courses:**

December 4 & 11	Saturday Course
January 3-7	Weeknight Course

**Office Use Only:**

Confirmation Sent: _____	Volunteer Orientation: _____	On Database: _____	On Listserv: _____
Course Info Sent: _____		Course: _____	

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