



**2011 Tax Season: Meet people. Build your resume. Have fun!
Make a difference in someone's life!
Volunteer with North County Lifeline's VITA Program.**

Opportunities in Oceanside and Vista. Training provided. Flexible scheduling.
Bilingual volunteers especially in demand.

Tax Team

Responsibilities: Tax preparation; explain tax returns and tax credits; promote federal savings bonds and financial literacy; assist clients in completing savings bonds enrollment forms; Quality Assurance; Electronic filing of tax returns; correct rejected returns; provide assistance to self tax preparation kiosk clients, travel to out-stationing locations and prepare taxes for clients that are unable to make it to our offices.

*FREE online and in-class IRS training courses required for novice preparers; experienced preparers may opt to test out of training.

Social Work Team

Responsibilities: Provide clients with information and on-site eligibility screening for public benefits (CalFresh, Medical, etc.); complete benefits applications; provide referrals to additional Lifeline programs, including the Financial Opportunity Center, Financial Literacy, Family Self-Sufficiency and more! **Bilingual skills helpful.**

Admin Team

Intake— Respond to client inquiries via EITC Intake Line; use a script to provide initial eligibility assessments; schedule appointments for eligible clients; contact clients the day before their appointment to remind them of their scheduled commitment; **Bilingual skills helpful.**

Reception— Prepare client folders for tax preparers; greet clients and address initial questions; site setup; assist clients with tax preparation kiosks. **Bilingual skills helpful.**

Clerical – Help prepare intake packets, assure that there are sufficient copies of all needed forms, create and maintain files, provide data entry assistance, assist intake specialists with call backs and assistance with other office duties as needed.

Data entry – Help input confidential tax and demographic information into an Excel database.

Want to Join a Team? Contact:

Lifeline's VITA Coordinator, Maria Colores at mcolores@nclifeline.org or (760) 842-6274.

I. How to get started:

- ❖ Contact Maria Colores, VITA Coordinator at mcolores@nclifeline.org to get started.
- ❖ Attend TAX TRAININGS (see Tax Team Trainings dates below). Don't forget to RSVP!
- ❖ Complete background clearance, drug and TB test (all paid by Lifeline, will be given more info when you contact us)

II. Important dates:

1. **Jan 3rd 2012 or before** – Get your VITA certification, all done online through www.irs.gov. Please visit: <http://www.irs.gov/app/vita/>.
2. **Jan 3rd, 5th, and 7th 2012** - Attend “ IRS Tax Wise Training” at Mira Costa College or make –up session the following week. Testing out is available for experienced volunteers only.
3. **Jan 3rd to Jan 9th 2012** - Turn in schedule for the tax season (or for as many weeks as possible).
4. **Friday, Jan 13th 2012**- Attend “Rehearsal Day” (a chance to practice before we go live)
5. **On and after Saturday, January 21st to April 16th 2012** - Start preparing taxes! ☺
6. **Saturday in early February, 2012** - Attend the **TAX KICK-OFF Event!** It's a huge event and we need all hands on deck!

III. Tax Team Training Dates:

1. Link and Learn overview: (optional)

- Monday, November 28th, 1:30 – 3:00 pm
- Saturday, December 3rd, 12:00 – 1:30 pm (make –up) - lunch provided

2. Basic Intro to Tax Law training I: (optional)

- Monday, December 5th, 4:30 – 6:00 pm
- Saturday, December 10th, 12:00 – 1:30 pm (make-up) – lunch provided

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3. Basic Intro to Tax Law training II : (optional)

- Tuesday, December 20th, 4:30 pm – 6:00 pm
- Wednesday, December 28th, 1:30 pm – 3:00 pm (make – up)

4. *Mandatory: TAX WISE Training (all 3 days) – Jan 3th (5:30 to 9), Jan 5th (5:30 to 9) and January 7th 2012 (9 to 2) at MIRA COSTA COLLEGE Computer Lab (more dates available)*

IV. We require a commitment of minimum 4 hours /week. See our schedule during the tax season:

➤ **Vista (200 Michigan Ave, Vista, CA, 92084)**

Wed - 1:30 pm to 7:30 pm

Fri - 9:00 am to 1:00 pm

Sat - 8:00 am to 4:00 pm

➤ **Oceanside (707 Oceanside Blvd, Oceanside, CA, 92054)**

Th - 4:30 pm to 7:30 pm

Sat - 8:00 am to 4:00 pm

➤ **Oceanside (1210 Divison Street, Oceanside, CA, 92054)**

Wed – 11:00 am to 7:00 pm

Sat - 8:00 am to 4:00 pm

➤ **San Marcos Location (3 Civic Center Dr., San Marcos, CA, 92069)**

Tu – 1:00 pm to 8:00 pm

Sat - 8:00 am to 4:00 pm

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