

Temple University - VITA

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Fox School of Business



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Background

- In 1969 the Internal Revenue Service (IRS) initiated the Volunteer Income Tax Assistance (VITA) program to provide assistance for low and moderate income individuals and families in filing their tax returns.
- Under the auspices of the IRS, Temple University has operated a site out of the Ambler campus since 2008.
- All participants at the Temple site must attend 20 hours of in-class training, as well as pass IRS certification exam(s)

Who can we help?

- As defined by the IRS we prepare tax returns free of charge for low & moderate individuals and families, which they define as income less than \$57,000.
- Despite our extensive training, our preparers are still volunteers, and consequently the IRS limits the types of returns we can do, as they call it scope restrictions. So we can't do your return if you own a business or rental property or are a day trader.

How can we help?

- We can prepare and electronically file returns for the 2016 through 2020 tax years.
- We can also prepare amended returns for those years.
- For 2021 we are preparing returns remotely, due to COVID concerns and restrictions.
- While the IRS will be accepting returns until May 17th, we will only be open till April 24th

How we operate?

- Returns are prepared by Temple University accounting students.
- Returns are then reviewed by a cohort that includes active and retired Temple University Accounting Faculty, Certified Public Accountants, Enrolled Agents, and Lawyers.

How can you connect with us this year?

- You cannot directly schedule an appointment this year.
- Instead we will call you to schedule an appointment once we have the information (from you) necessary to prepare your return.
- If you have a question on what documents are needed to prepare your return you can email us at vita@temple.edu or via Senator Collett's website (senatorcollett.com/taxes) and we will email (faster) or postal mail (slower) the list.

How can you get us your documents?

- Fastest way, upload your documents to getyourrefund.org/tuvs
- Get your refund which a site developed by Code for America, a national nonprofit, will walk you through the process and let you know what documents you need to upload. They also have live chat.
- You do not need a computer, a tablet or smartphone will work as well.

How can you get us your documents?

- Mail copies of your tax documents to
P.O. Box 1031, Springhouse PA 19477

Thank You!