



Vitalizing The Community Through VITA: Volunteer Income Tax Assistance



VITA Overview

- VITA is an annual community service program designed to relieve the financial burden associated with tax season for low-income families
- Provides free tax preparation for households with Adjusted Gross Income (AGI) under \$51,000
- The client's returns are prepared by UB School of Management students who are certified by the IRS
- The program operates on weekends from January through April each year
- Over the past six years, \$5.5 million in tax refunds have been brought back to the Buffalo community

Program Growth

Year	Volunteers	Hours	Returns	\$ Returns
2008 – 2009	264	3300	1076	\$875,000
2010 – 2011	334	4400	1500	\$2,000,000
2012 - 2013	315	4200	1750	\$2,600,000



Procedure

1. The clients complete intake sheets to provide accurate and vital information required for the completeness of the returns
2. The volunteers interview the clients to ensure that correct information is written on the intake sheets
3. The volunteers prepare the returns in a timely and proficient manner in order to mitigate the financial stress on the taxpayers
4. A quality reviewer attests the accuracy and completeness of the return
5. Volunteers answer any questions the client may have about the completed returns or taxes
6. Federal & state tax returns are electronically-filed within 48 hours to be verified by the IRS
7. Money is returned to the local Buffalo community through federal and state refunds

Expansion

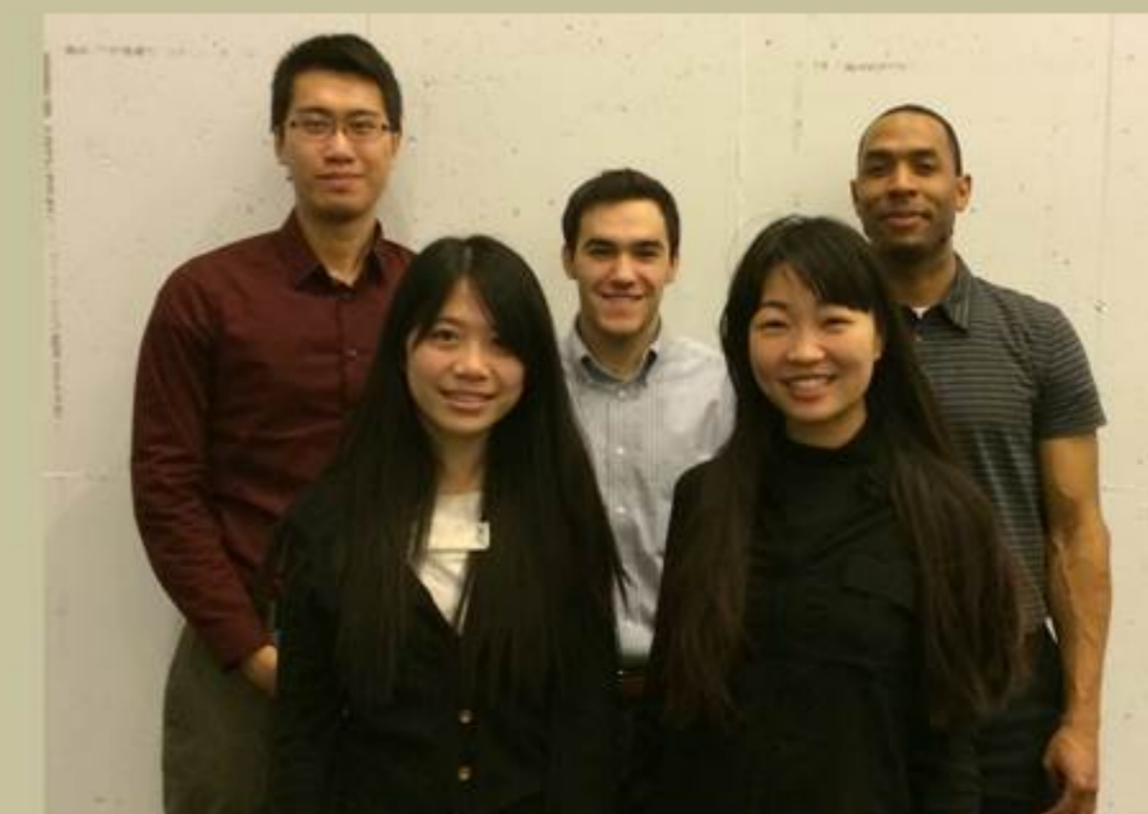
- Virtual VITA Program
- Partnerships with Community Organizations
- Downtown Buffalo UB Campus Location

IRS Awards Received

- Best Overall VITA Program
- Number of Returns Prepared
- Total Number of Volunteers
- Number of Volunteer Hours

2014 Projected Figures

- **204** IRS Certified Volunteers
- **985** Returns Prepared
- **2300** Volunteer Hours
- **\$1,500,000** Returned to Buffalo



Current Locations

- 106 Jacobs (North Campus)
- 100 Allen Hall (South Campus)