



Quarterly Tax Review

from the Boston EITC Coalition



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Looking forward to 2010

Welcome back, partners, sponsors, and most importantly: volunteers! The Boston EITC Coalition has already begun recruitment and planning for the upcoming tax season. We ask that you take a few minutes to look over this newsletter—we've included some information on key changes this year: a first ever intermediate level volunteer training, brand new tax preparation sites in Roxbury and Dorchester, a new volunteer management website for both volunteer training signups and for site selection, and new faces at the Coalition. Thank you, and we look forward to working with you this year!

Strange Tax Trivia

The ancient Greeks revered the tax professional as the most noble man in society.

From "Understanding Taxes" at IRS.gov.

Second year VITA Grant, and MTAC partners across the state

Interested in volunteering outside of Boston? Know someone who might be? The Boston EITC Coalition is now partnering with VITA programs outside of Boston. The Coalition originally brought Chelsea Neighborhood Developers, Lawrence Community Works, Massachusetts Justice Project, Springfield Partners for Community Action, and the Valley Opportunity Council together in 2008 to form MTAC—the Massachusetts Tax and Asset Building Consortium—for the purpose of applying to the IRS's first ever grant program for VITA programs. We are pleased to announce that MTAC has now received a second VITA grant, and that the partnership is growing stronger.

Some of the VITA funds have gone toward developing a more comprehensive volunteer management website to be shared by all MTAC partners. (More information on this new site in the pages below.) Visit this site (www.massassets.org/MTAC) to learn more about VITA programs outside of Boston.

The many ways to volunteer

Coalition sites always need a variety of volunteers. Here are some of the ways you could help:

Tax Preparer: Help Boston residents file their taxes! After receiving training and becoming IRS/VITA certified, volunteer tax preparers do basic returns at 28 Coalition sites throughout Boston.

Intake Screener: At some of the busier sites, intake screeners manage the flow of the tax site by handing out forms, answering basic questions, and directing taxpayers to the next available volunteer.

Credit Advisor: Help taxpayers understand their credit report and score in a short, one on one session while they are waiting to have their taxes prepared. Credit advising will take place at 9 sites.

Financial Coach: The Coalition is offering a new financial coaching program called "Strengthen Your Financial Future" at three sites: DotWell's Codman Square Tech Center, the Roxbury Resource Center, and ABCD's Tremont Street location downtown. Through repeat individual sessions, financial coaching volunteers help individuals with credit advising, budgeting, banking information, benefits screening, and referral assistance.

How to sign up for volunteer trainings

It's that time again: time to sign up for volunteer tax preparation training! This year the EITC Coalition is using the aforementioned **new volunteer website** along with our other MTAC partners — so everyone is going to have to sign on and create a new account (including returning volunteers). The good news is that this new site has a host of features to make life easier for both site coordinators and volunteers. You can reach training signups the same way as ever: go to www.bostontaxhelp.org, click on the “**Volunteer Now**” button, and sign up. All the training dates — weekends, weeknights, at sites all over Boston from now until early 2010 — are now online for your convenience.

As a reminder, returning volunteers must still pass this year's test in order to be certified to volunteer.

Also, for those of you interested in going the extra mile, this year Coalition is offering brand new **intermediate level trainings!** Intermediate level VITA certification will allow volunteers to prepare taxes with simple small businesses and the Schedule C-EZ, itemized deductions and the Schedule A, and certain retirement/pension income and the 1099-R. **Note: you must complete the beginner certification test before attending an intermediate training.**

Attention returning volunteers: We are recommending this year that all returning volunteers, even those who choose not to attend a beginner level training, attend a testing session in person, in order to cover all the new tax laws and expanded credits in 2010 due to the American Reinvestment and Recovery Act.

New tax sites in Dorchester, Roxbury

The Coalition is thrilled to announce that it's growing again this year: a number of both new and old partners are opening up sites all over the Dorchester and Roxbury neighborhoods for this coming tax season. In Roxbury, we welcome:

Morgan Memorial Goodwill Industries. Located at 1010 Harrison Ave in Roxbury, Goodwill has long been a partner of the Coalition's Disability Initiative. The Coalition plans to transition its previous mobile tax site (which visited various vocational sites for persons with disabilities and barriers to employment) into assisting Goodwill start up as a tax site especially prepared to serve working Boston residents with disabilities. Coalition VISTA Christina McRorie will be coordinating Goodwill's first-year VITA operations.

And a new **ABCD satellite site at 195 Dudley Street** in Roxbury.

In Dorchester, we welcome:

The Way of the Cross Holy Church at 65 Ashton Street, Dorchester. Given the longstanding partnership between the Black Ministerial Alliance and the Coalition, the EITC pleased to welcome a member of the Black Ministerial Alliance as a tax site this year! Minister Ollie Rowe will be coordinating this site.

Another new **ABCD satellite site at 551A Talbot Avenue** in Dorchester. ABCD is in part opening these two new satellite sites with funds they've received as a part of the American Reinvestment and Recovery Act. (Visit www.bostonabcd.org for the whole story.)

And, finally, we welcome **WORK Inc.** to the Coalition! WORK Inc. is a leading nonprofit providers of rehabilitation services in Massachusetts, and this year they will be opening up their new location in Dorchester at 25 Beach Street as a VITA site as well. AmeriCorps volunteer Bill Getman will be the site coordinator there for their first year, during which they will focus on serving AbilityOne employees.



VISTAs, both coming and going

As of this past November 21st, **Jessica Cook**'s year of service as an AmeriCorps*VISTA with the EITC Coalition is up. But, as you can read below, she's not leaving the Coalition just yet!

Arriving just in time for tax season, we are excited to have two new VISTAs join us:

Brent Cole Mayo just finished a law degree at Suffolk University, although he is originally from Tennessee. He will be working closely with ABCD sites this year, particularly focusing upon building a program to address the needs of Boston taxpayers facing home foreclosure.

Phan Huynh comes to us from sunny southern California, where he has been working as a financial advisor and volunteer coordinator. He will be working on Asset Building programs, and serving at Dotwell sites during the tax season.



New faces at the Coalition: Jessica and Angelina

Just as new partners and sites have joined us just in time for the 2010 tax season, we've also had a few recent additions to our central staff:

Previous VISTA **Jessica Cook** is now the Coalition's **Asset Building Program Coordinator!** She will continue to manage the Credit Advising Program, as well as co-chair the Asset Building Working Group along with new VISTA Phan Huynh. She is also managing the new year-round financial coaching program "Strengthen Your Financial Future."

We are also very pleased to welcome **Angelina Camacho** to the team as **Community Access Coordinator**. Angie not only brings considerable experience in the field of health insurance and community outreach to the table, but also two years of experience as a volunteer tax preparer at the Roxbury Resource Center. She is currently managing the new statewide Ambassador Program with Faisal Farhat, as well as expanding our HIPster (health information professional) program, which focuses on assisting taxpayers with healthcare access and insurance enrollment issues.

Staying in touch

Want more information on where to volunteer, how to get trained, what we're all about? Now there are more ways than ever to get in touch with us!

This year we have a new volunteer management website at massachusetts.org/MTAC. The EITC Coalition is now sharing this website with other MTAC (Massachusetts Tax and Asset Building Consortium) partners. You can reach volunteer training signups here, however, the same as ever—by clicking on the "**Volunteer Now**" button on the front of our website at www.bostontaxhelp.org. Not only does this site have the signups for volunteer trainings, but it is also where volunteers will sign up for tax preparation shifts at the sites. (Don't worry; more information on how to use this site will be given at trainings.)

We also regularly update a blog with key information for volunteers and partners. Subscribe to receive the blog as an email newsletter at www.bostontaxhelp.wordpress.com.

And of course, we're also on **Facebook**, the final frontier! Just search for "Boston EITC" or "Craig Far" and you'll find us. Craig Far, our resident media guru and Volunteer Coordinator, regularly updates this page with important volunteer information and with photo albums of Coalition events.



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Steering Committee

ACORN

Action for Boston Community Development

AARP

Boston Chamber of Commerce

Boston Chinatown Neighborhood Center

Boston Housing Authority

DotWell

Federal Reserve Bank of Boston

FDIC

Morgan Memorial Goodwill Industries

Greater Boston Legal Services

Hispanic Office of Planning and Evaluation

IRS

Jewish Vocational Services

Massachusetts Rehabilitation Commission

National Consumer Law Center

One Economy

Office of Jobs and Community Services

Roxbury Resource Center

SEIU 1199

*The mission
of the Boston EITC
Coalition is to
alleviate poverty in the
city of Boston by:
maximizing the impact of
the EITC through free
community based tax
preparation;
providing low-income
taxpayers with strategies
to build personal and
community wealth;
and advocating for fair
and equitable tax
policies that benefit
working families.*



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