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FOR IMMEDIATE RELEASE

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Cal Poly's Low Income Taxpayer Clinic Saves Taxpayers Nearly \$1.2 Million

SAN LUIS OBISPO — Cal Poly's Orfalea College of Business is celebrating the fifth anniversary of its Low Income Taxpayer Clinic (LITC), which has saved clients almost \$1.2 million since its inception in January 2010.

As part of the celebration, the college is releasing a special report on the program's community impact. The report compiles data on the clinic's work with Cal Poly students, local taxpayers and communities in San Luis Obispo, Santa Barbara, Monterey and Ventura counties.

Since it began, the LITC has assisted approximately 2,880 California clients through consultation, education or direct assistance before the Internal Revenue Service, California's Franchise Tax Board, and U.S. Tax Court. In many cases, the LITC advocates significantly reduced or eliminated a client's tax liability by clarifying applicable legal and tax provisions, establishing substantial economic financial hardship, providing substantiation of client expenses or deductions, filing the proper tax forms, or negotiating settlements.

The LITC provides undergraduate and graduate business students the opportunity to work with underserved communities while enhancing their professional accounting and taxation skills. The clinic was conceived as an experiential service-learning project based on Cal Poly's Learn by Doing philosophy. LITC student advocates, under the direct supervision of Orfalea College of Business faculty, represent low-income taxpayers involved in controversies with the IRS and California's Franchise Tax Board. Students also educate community members on the rights and responsibilities of taxpayers through year-round outreach events. Students provide personal consultations, legal and tax assistance, and educational materials in English and Spanish, all at no charge.

"Working in the LITC allows students to develop valuable professional skills while helping real clients resolve real problems," said LITC Executive Director Lisa Sperow.

More than 160 students have participated in the program as their senior project, gaining practical experience working with a variety of tax cases and controversies. Each case requires a student to become familiar with the federal tax system and applicable tax laws and exercise professional judgment to find an appropriate solution.

The Cal Poly LITC is the only tax clinic of its kind in the region, according to Sperow. Cal Poly is also the first academic LITC not affiliated with a law school to assist unrepresented taxpayers during trial sessions through an agreement with the U.S. Tax Court. Students assist attorneys Sperow and clinic founder Eddy Quijano in advising litigants at the Tax Court's calendar call sessions at the U.S. Courthouse in Fresno, Calif. Cal Poly has attended four calendar call sessions since May 2013.

The Orfalea College of Business founded the LITC through the generosity of Chevron Corp. and a grant from the IRS Taxpayer Advocate Service. The LITC is funded through annual grants from the IRS, which the Orfalea College of Business matches. The LITC's annual funding has nearly doubled since its inception. In 2015, the IRS has supplied a \$77,000 grant for controversy work and a \$10,000 grant for the LITC's Spanish-language outreach efforts in the community.

For more information, visit www.litc.calpoly.edu.

About the Orfalea College of Business and Cal Poly

The Orfalea College of Business, one of six academic colleges at Cal Poly, is a nationally ranked, four-year, comprehensive public university in San Luis Obispo. Cal Poly is a distinctive learning community offering academically focused students a hands-on educational experience that prepares them for today's scientific and technical world. For more information, visit www.cob.calpoly.edu.

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