Cal Poly Orfalea College of Business Expands Volunteer Income Tax Assistance Program for Underserved Communities

SAN LUIS OBISPO – A grant from Pacific Capital Bancorp (PCB) will enable Cal Poly’s Orfalea College of Business to expand its Volunteer Income Tax Assistance (VITA) program from a single site in San Luis Obispo to an additional site in Santa Maria.

The expanded program will build on an initial partnership between Allan Hancock College (AHC) and the United Way that helped 300 Santa Maria families file their taxes in 2008. The goal is to increase the number of federal and state taxes filed from the Santa Maria site to 800 in 2009 and assist taxpayers in collecting $750,000 in Earned Income Tax and Child Tax Credit that go unclaimed.

The cooperative effort is part of the annual VITA program through which Cal Poly accounting seniors gain experience preparing tax returns and perform a valuable service helping underserved members of the community. A celebration of the partnership and expanded program will be held Feb. 7 at noon at the AHC Community Center.

The grant will facilitate transportation and staffing of 20 Cal Poly accounting seniors weekly to a site located at AHC, and fund oversight of the program by Hilda Zacarias, a graduate of Cal Poly and Harvard, and a member of the Santa Maria City Council.

Representatives from Santa Barbara Bank & Trust, a division of PCB, will be on-site to assist clients with new account information and related banking needs, supporting the goals of United Way’s Family Financial Stability Education and Training program.

The VITA program is an IRS-sanctioned program. Student returns are reviewed by certified tax preparers. Spanish-speaking preparers will be available at both locations.

The IRS occasionally conducts on-site, unannounced reviews of VITA sites and maintains error rates on returns prepared at each site. Cal Poly’s VITA program ranked first in 2007 and fifth in 2008 among all single VITA sites in the Los Angeles Territory, and first among ten college VITA sites in the same area for both 2007 and 2008. The Los Angeles Territory consists of 230 VITA sites in Los Angeles, Ventura, Santa Barbara and San Luis Obispo counties.

Forms that will be prepared include 1040; 1040EZ; 1040A; 540; 540A; 540EZ and 2EZ, as well as some supporting forms.

Eligibility:
Families with incomes less than $42,000 per year

Locations:
San Luis Obispo:
The third-floor computer lab in the Business Building. Visitors are asked to enter Cal Poly via California Blvd. and follow the signs to the Orfalea College of Business. Parking is free.

Allan Hancock College:
The Community Education Center on Allan Hancock College main campus.

Dates:
Cal Poly Location: Every Saturday beginning Jan. 31 to March 14, from 11 a.m. to 2:30 p.m. Those receiving assistance are asked to arrive prior to 2 p.m. to allow sufficient time to process the return accurately.

Allan Hancock College: Every Saturday beginning Jan. 31 to March 14, from 9 a.m. to 1 p.m. The AHC location will launch the program with a Celebration on Feb. 7 at noon.

Documents Needed:
Those participating are asked to bring their Social Security card or ITIN number, 2007 tax returns and all 2008 tax-related documents including child-care expenses, and child-care provider identification number and phone number.

For more information, call 756-2667 (English and Spanish).

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