



## Creating Assets, Savings and Hope (CA\$H) of the Greater Capital Region

*A United Way – led coalition helping people achieve financial stability*

### Join CA\$H and United Way



## HELP HARD-WORKING, LOW-INCOME FAMILIES GAIN VALUABLE TAX SAVINGS

# Volunteer with VITA!

Choose an opportunity that fits your background and interests. Training is provided.

### What is CA\$H

CA\$H is a coalition of community, social, faith-based, educational, business, financial and government partners dedicated to promoting financial stability and long term asset building for individuals and families in the Capital Region. CA\$H leads the Volunteer Income Tax Assistance (VITA) / AARP tax aide program.

### What is VITA?

The Volunteer Income Tax Assistance Program (VITA) provides free tax preparation that helps filers access the tax credits and refunds they are entitled to. There are free VITA sites in each county across the greater Capital Region. Sites are staffed by volunteers representing United Way, the finance industry, the IRS, social services and community members.

### United Way's Role

As a leader in bringing community resources together to advance the common good, United Way convenes and oversees the CA\$H Coalition, ensuring that efforts are effectively coordinated across five counties and eligible individuals receive tax assistance and tools for long term financial stability.

#### Tax Preparer

Help taxpayers complete their returns using taxpayer-provided information. Review completed return for quality and accuracy. Requires nine hours of in-class training. Flexible training schedule offered.

#### Quality Reviewer

Use a designated Quality Review tool to evaluate completed tax returns for accuracy. Correct errors and provide feedback to a volunteer preparer. Requires nine hour of in-class training. Flexible training schedule offered.

#### Greeter

Welcome taxpayers to a VITA site. Screen all taxpayers upon arrival to ensure each has the necessary information to complete his or her return. Monitor site traffic to ensure sufficient time is allowed to serve filers.

#### Scheduler

Screen taxpayers to determine the type of assistance they need and the forms that will be required to complete their returns. Schedule tax return appointment with a preparer having the appropriate technical level.

#### Asset Specialist

Provide financial education materials to taxpayers and answer questions as necessary. Make referrals upon request.

#### General Office Assistant

Survey taxpayers and provide completed surveys to VITA site coordinator. Assist with the traffic flow at the site to make sure waiting times are minimal. Assist the VITA site coordinator as needed.

**NOTE:** Average volunteer commitment is two to four hours per week from January 15 to April 15. Volunteers are required to maintain the confidentiality of taxpayer information. Training schedules can be found online at [www.cashgreatercapitalregion.org](http://www.cashgreatercapitalregion.org) or by calling 518.456.2200 ext. 132.

**Last year, \$12.9 million in total tax dollars were returned to the Capital Region for reinvestment in the local economy and to help working individuals and families achieve financial stability.**



*The CA\$H coalition is part of United Way of the Greater Capital Region's commitment to bring people and resources together to achieve measurable and sustainable improvements in the quality of life for our community.*