Audio Transcript
Thank you for your interest in the Volunteer Income Tax Assistance Program! Cal Poly Seniors have been involved in VITA since 1992. We are sponsored by the California Franchise Tax Board, the Internal Revenue Service, and the Cal Poly Accounting Department.
Each return is prepared by a trained Student preparer and reviewed by a certified tax professional. Our site operates from February first to mid March; accepting clients from 11-2 on Saturday. If questions should arise after this time, tax inquiries may be directed to the IRS, a local Enrolled Agent, or CPA. We do not keep copies of tax returns, therefore please make copies for your records.
VITA may be accessed by taking the California BVLD entrance to Cal Poly. Signs will be posted to direct you, and free parking is available. We are located on the third floor of the Orfalea College of Business.
(Requirements)
Audio Transcript
VITA is a program for low income taxpayers. In order to qualify for tax assistance you must meet these qualifications:
For the current tax year the sum of all sources of income must be under the amount specified on our website. In addition please bring all of the following where applicable.
Your Photo ID
The Social Security number and birth dates for you, your spouse, and your dependents. Each person must use the correct Social Security number and both spouses must be present to sign a joint return. It is helpful but necessary if you have your Social Security Cards on hand.
Any Wage and earning statement form W-2s
If self employed, for example you run your own business, bring well organized income and expense information. We do not have time to sort through receipts. For this reason clients should provide an accurate summary of this information.
Any Interest and dividend statements Form 1099's
The Date acquired, date sold, and selling price for stock and fund sales, including original purchase price.
Last year's Federal and State income tax returns
If you paid costs for child care that allowed you to work or seek employment, bring the Provider's Identifying #, Phone #, and the amount paid for care. You may be able to receive a credit.
If you Rent, bring the Name, Address, and Phone # of all land lords for the year. You may be able to receive a credit.
Your bank account and routing numbers for direct deposit/or withdrawal. This will allow you to receive a refund nearly twice as fast as filing a paper return when you e-file. If you owe tax you do not

have to pay right away, we can schedule your payment. All of your personal information is safeguarded for your protection.
Finally please bring all other Tax Documents
We will be unable to help you if:
You have more than five 5 stock or fund sales,
You have rental income, for example you receive rent from an individual living in your home,
You have income from a partnership or trust
You have depreciation related to business income
We CAN NOT help you if you file "Married Filing Separate”.
We appreciate your interest in our program, and look forward to working with you! For more information please visit our website.