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LUTER STUDENTS OFFER FREE TAX PREP

ACCOUNTING MAJORS PUT THEIR SKILLS INTO PRACTICE OFFERING TAX GUIDANCE.

by [Kelli Caplan](#) | February 14, 2023*Read time: about 2 min*

Students from Christopher Newport University's [Luter School of Business](#) are spending the next two months helping local residents complete their e-file tax returns. The free service is offered to the public on a first come, first served basis.

The accounting majors were trained as volunteer tax preparers by the Volunteer Income Tax Assistance (VITA) Program, which is sponsored by the IRS. The student tax preparers are certified to prepare basic tax returns, including Forms 1040; Schedule A and B; simple Schedule C and D, and forms related to the Earned Income Credit, Child Credit, Dependent Care Credit, Additional Child Credit, Credit for the Elderly and Disabled, and Education Credit.

"This program helps our students in so many ways," said Professor Mary Scott. "It allows them to use the knowledge they have learned and apply it in a real world situation."

David Dougherty, '23, an [accounting](#) major, is in his second year of volunteering as a student tax preparer. He believes this real-world experience will benefit him in his future career.

"It's great to be able to apply what I have learned in the classroom to real life," said Dougherty, who plans to pursue a career in public accounting. "I love meeting people and believe this is valuable experience that I can put on my resume."

For accounting and [finance](#) double major Sarah Lewis, '23, the opportunity to help prepare taxes fits in perfectly

with her skill set and career goals.

"I am very excited about it," said Lewis, who is in her first year with the program. "I gained a lot of accounting experience during my summer internship, and wanted to do this to get more tax experience."

Lewis said the accounting and tax classes she has taken have prepared her to participate in the program.

"My classes have definitely prepared me well," said Lewis, who plans to pursue her master's degree and become a CPA. "I'm getting real in-person experience and I can apply what I have learned in the classroom."

The program was started at Christopher Newport 17 years ago by Professor Emeritus Gabriele Lingenfelter. She retired in 2021, but still oversees the program and is there to mentor students as they prepare the taxes. "This hands-on experience is so beneficial to students when they enter the workforce. Employers value this kind of experience."

"It's also a great opportunity for students to interact with the community and lend a helping hand," Scott said. "Hopefully students will continue to see the value of volunteering and continue to do so in their careers."

All student preparers must pass the online VITA class and exam before they can participate. The free tax preparation service is geared toward taxpayers with an income of \$70,000 or less. The service is available in room 143B on the first floor of Luter Hall on the CNU Main Campus on Mondays. The hours for tax preparation are from 11 a.m. to 6 p.m. The service will not be available on March 6. The last day for the student tax preparation will be April 17th.

Anyone interested should bring the following documents:

- Photo identification
- Social Security cards for taxpayers and dependents
- Birth dates for primary, secondary, and dependents on the tax return · Wage and earning statement(s), such as Form W-2, W-2G, 1099-R, from all employers
- Interest and dividend statements from banks (Forms 1099)
- Form 1095 A (if applicable)
- IRS Letter 6419 (if you received the Advance Child Tax Credit payments) · IRS Letter 6475 (if you received the Economic Impact (Stimulus) Payments) · A copy of last year's tax returns (if available)
- If using direct deposit, bank routing numbers, and account numbers
- Other relevant information about income and expenses, such as total paid for daycare and daycare provider's identifying number

If filing a married filing joint tax return, both spouses must be present to sign the required forms.