

NEWSROOM

[Home](#) / [News](#) / [2024](#) / [January](#) / Filing it Forward: Luter Students Embark on Tax PrepFILING IT FORWARD: LUTER STUDENTS EMBARK ON TAX
PREP

ACCOUNTING MAJORS FILE RETURNS FOR PUBLIC

by [Kelli Caplan](#) | January 31, 2024*Read time: about 2 min*

When Stephen Johnson was interviewing for a job at a Big Four accounting firm, it came up that he had done volunteer tax preparation for area residents.

He explained what he did, and what skills he gained from the experience. He is one of several accounting majors in the [Luter School of Business](#) to take part in the Volunteer Income Tax Assistance (VITA) Program, which starts its work on 2023 tax returns on Feb. 7. Sponsored by the IRS, the program allows for qualified students to prepare taxes for qualified area residents for free.

“They asked me about it,” said Johnson, who is in his second year participating in the program. “It shows I can be on a team and work with clients.”

Johnson, '24 [Accounting](#), got the job.

For Zach Mair, '24 Accounting, the experience interviewing for a job with another Big Four firm was very similar. In fact, one of the partners he interviewed with had also participated in VITA at college and was excited to talk with Mair about the program and all of the benefits he gained from it. The interview went well, and Mair was also offered a job.

Both Mair and Johnson believe that real-world experience preparing taxes, combined with the opportunity to work

with clients, made all the difference when it came time to find a job.

“It’s really good practice and looks great on your resume,” Mair said.

Johnson and Mair have been part of the VITA program for two years.

“It’s a great way to learn,” Johnson said. “People really appreciate it. You see their faces light up.”

Twenty-eight students who will be participating in the tax prep effort this year, up from 14 last year. All of the students must pass an online VITA class, which certifies them through the IRS to prepare basic tax returns.

“It’s always nice to help people,” said Sean McClure, ‘24 Accounting. “Every return is unique, so it helps me to learn the accounting process.”

This year the VITA program has moved off campus to a storefront located at 9 Hidenwood Shopping Center, making it more accessible to the public. The tax prep office will be open every Wednesday from 10 a.m. – 6 p.m. beginning Feb. 7, but will be closed the first week of March during Spring Break.

Mary Scott, instructor in the Department of Accounting and Finance and head of the VITA program at CNU, said being able to prepare taxes is a great skill for accounting students. “It’s very important for them to get real life experience,” she said.

She is hoping that moving the service off campus will both draw more people. The free tax preparation is geared toward taxpayers with incomes of \$70,000 or less. The students work in teams of two and are supervised by Scott.

“People are very pleased with our students,” she said. “It’s a great way for them to interact with the community.

“Students are enjoying it.” Scott said. “It’s good for them, good for us, and good for citizens.”

Anyone interested in having students prepare their taxes 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 statements, 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 receive the Advance Child Tax Credit payments). IRS Letter 6475 (if you received 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 joint tax return, both spouses must be present to sign the required forms.
