CSUN

DAVID NAZARIAN
COLLEGE OF BUSINESS
AND ECONOMICS

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VITA
CLINIC

THE CSUN VITA CLINIC

ANNUAL REPORT
2016

Empowering low income taxpayers
to reach *higher*

Introduction

The CSUN VITA (Volunteer Income Tax Assistance) Clinic, established in 1970 as the first in the nation VITA Clinic, is a university affiliated program providing low- to middle-income Los Angeles area residents with free, quality tax return preparation.

Powered with almost **300** volunteer IRS certified preparers, the CSUN VITA Clinic had the following impact in 2016:

- Served more than **3,000** low income taxpayers with free federal and state tax returns.
- Saved Los Angeles residents an estimated **$910,000** in tax preparation fees. [1]
- Brought **$3.2 million** in federal refunds and another **$406,000** in state refunds back into our community, thereby boosting our local economy.
- Helped Los Angeles workers claim more than **$1.1 million** in Earned Income Tax Credits, thereby empowering people to move out of poverty.
- Provided in excess of **8,300** community service hours serving the public in eight locations throughout the San Fernando Valley.

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[1] Assuming a $300 per return fee

"I wish I had taken advantage of this free service in the past. It would have saved me a lot of time, stress, sleep, and money. Every dollar counts and I am SO GRATEFUL to this Clinic and to CSUN for sponsoring it. I have not only received more money back on this refund /return but I have had my faith restored in humanity. THANK YOU."

-Taxpayer, April 2016

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The CSUN VITA Clinic helps move people out of poverty through the use of credits and refunds

Tax time is critical to working families. Tax credits such as the Earned Income Tax Credit (EITC), the Child Tax Credit and the Educational Tax Credits can provide a critical boost to family income, especially to those hovering at the poverty line. These credits help struggling Los Angeles residents cover their basic needs including food, housing, child care, transportation and health care.

A taxpayer completing his intake form at the CSUN VITA Clinic

The VITA Clinic has not only saved taxpayers an estimated $910,000 in tax preparation fees this past tax season; it has also ensured that thousands of households received the tax credits they deserve. It is estimated that 1 out of 5 people who qualify for the EITC don't claim it on their tax returns. The volunteers at the VITA Clinic ensure that all eligible individuals served by the clinic receive the maximum refundable tax credit allowed (up to $6,242 in 2015).

The CSUN VITA Clinic helps boost the local economy

The EITC benefits not only low-income families, but also the wider communities in which they live. Economists suggest that every increased dollar received by low- and moderate-income families has a multiplier effect of between 1.5 to 2 times the original amount, in terms of its impact on the local economy and how much money is spent in and around the communities where these families live.[1] Using the conservative estimate that for every $1 in EITC funds received, $1.50 ends up being spent locally in the San Fernando Valley, the CSUN VITA Clinic has helped neighborhoods in the San Fernando Valley effectively gain as much as **$1.7 million** in 2016 through the EITC alone.

A supervisor assisting a taxpayer

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[1] U.S. Conference of Mayors, Best Practices: Earned Income Tax Credits (2008 2nd edition).

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The CSUN VITA Clinic provides a unique opportunity for experiential student learning

Lead Supervisor at work in the CSUN VITA Clinic

We are strong believers in infusing practice to learning. As such, faculty in the introduction to federal income tax course integrate the VITA tax preparation experience as part of the learning experience. By doing so, we are able to offer our students a unique opportunity for experiential learning in the field.

The CSUN VITA Clinic is fully accessible to the public it serves

The CSUN VITA Clinic operates **six** days per week throughout the tax season from late January through mid-April in **eight** community sites in the San Fernando Valley. We invite taxpayers to make an appointment online for one of the various CSUN VITA sites, walk in to their desired service site, or simply drop off documents and return a week later to pick up the completed return. Finally, through the use of Spanish language interpreters at each site, who are Spanish language students at CSUN, the CSUN VITA Clinic helps many immigrants learn about the U.S. tax system.

The CSUN VITA Clinic serves as a gateway for financial counseling

In collaboration with the CSUN's Personal Financial Planning Program and the Consumer Affairs Program at CSUN, taxpayers served by our clinic are offered free financial literacy materials, as well as one-on-one help on developing a financial plan and asset building services for their family, thereby supporting the taxpayers towards financial stability. Topics covered include: Budgeting · Retirement planning · Education planning for children · Debt overview · Renting versus buying decision.

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THE 2016 TAX SEASON - THE NUMBERS

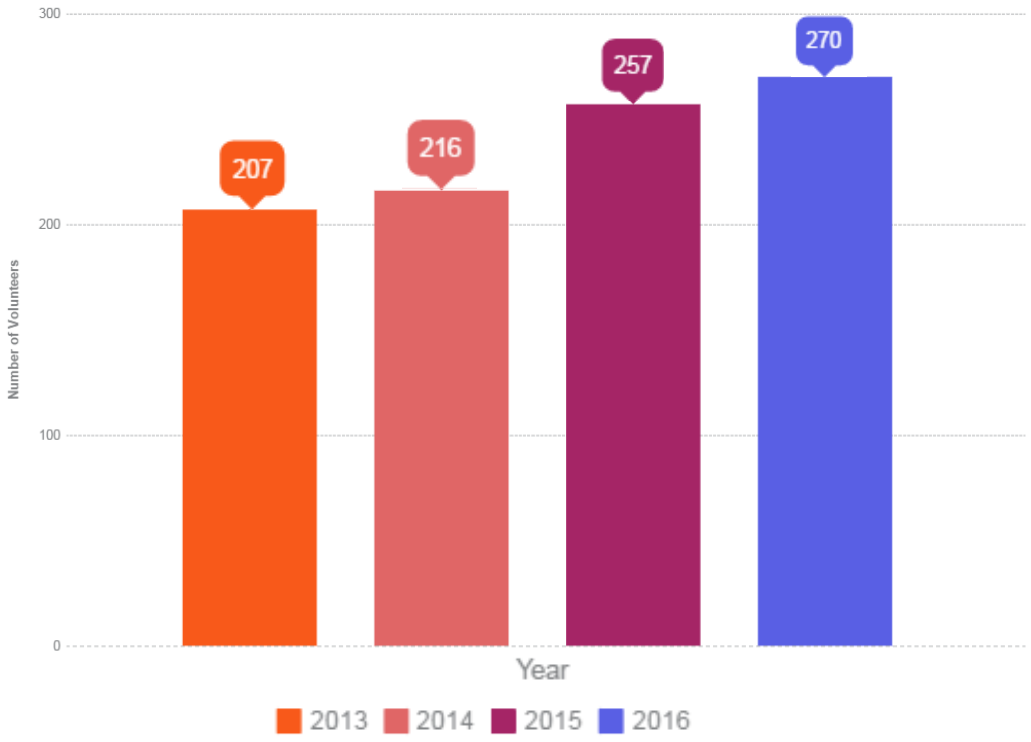
IRS Certified Volunteers

Federal Tax Returns Prepared

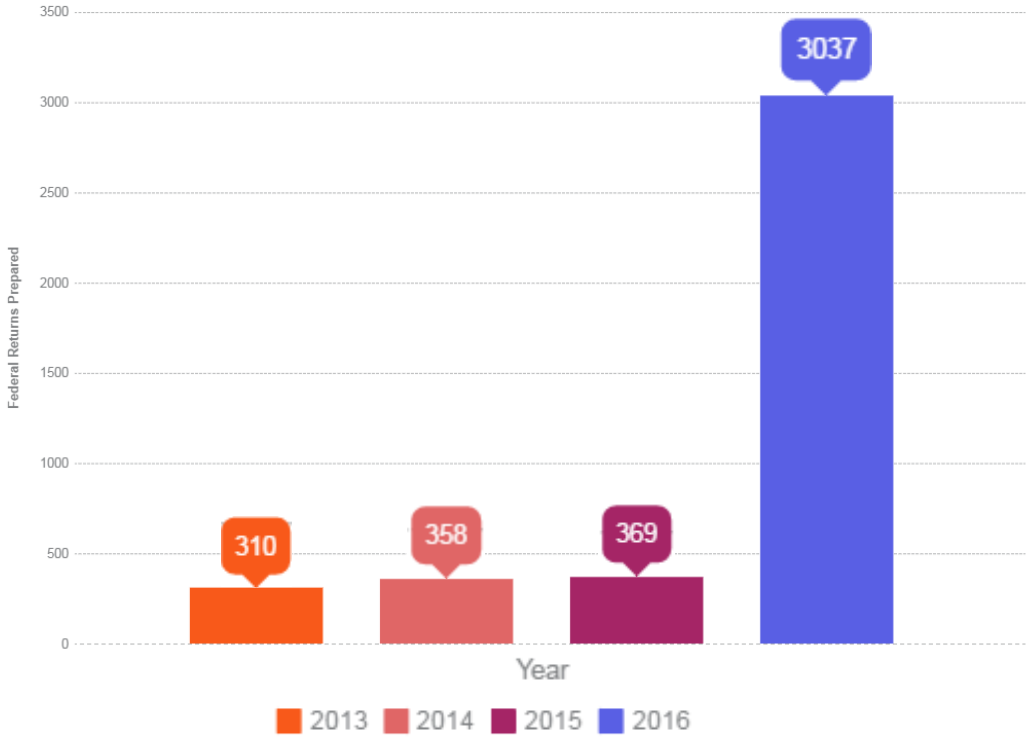
Total Refunds (in millions)

Earned Income Tax Credit
(in millions)

CSUN VITA is Growing: Number of Volunteers



Federal Tax Returns Prepared



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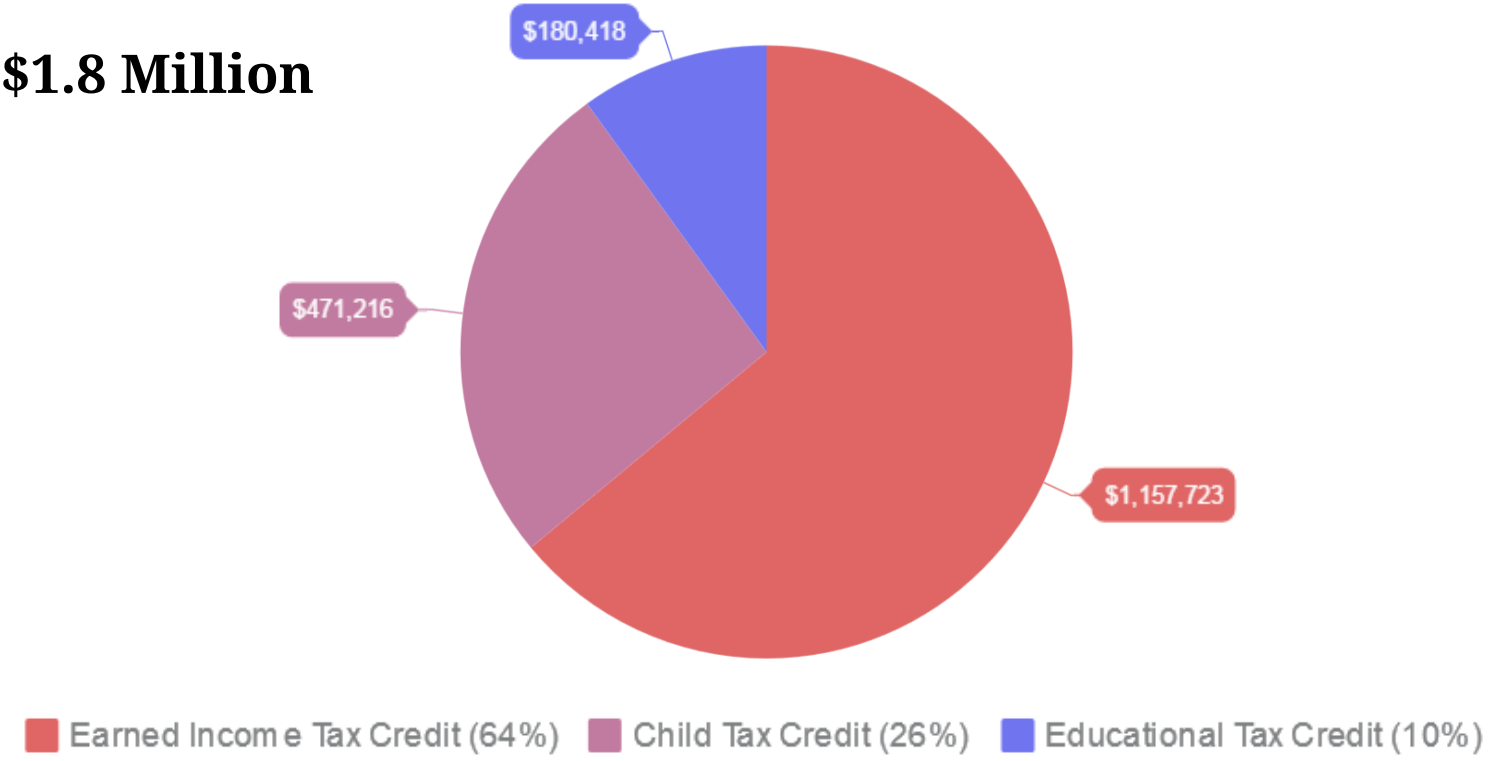
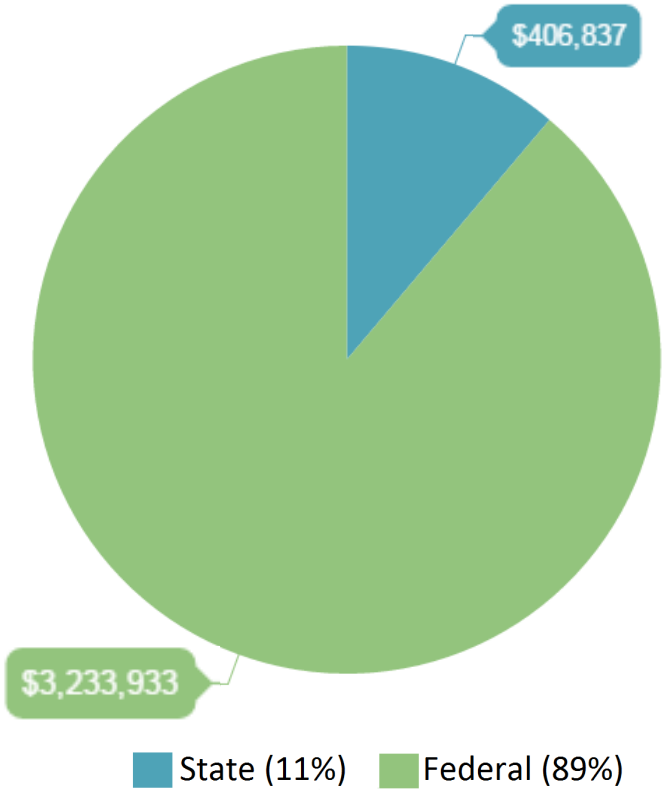
CSUN VITA is Growing:
Federal Tax Credits Generated

$1.8 Million

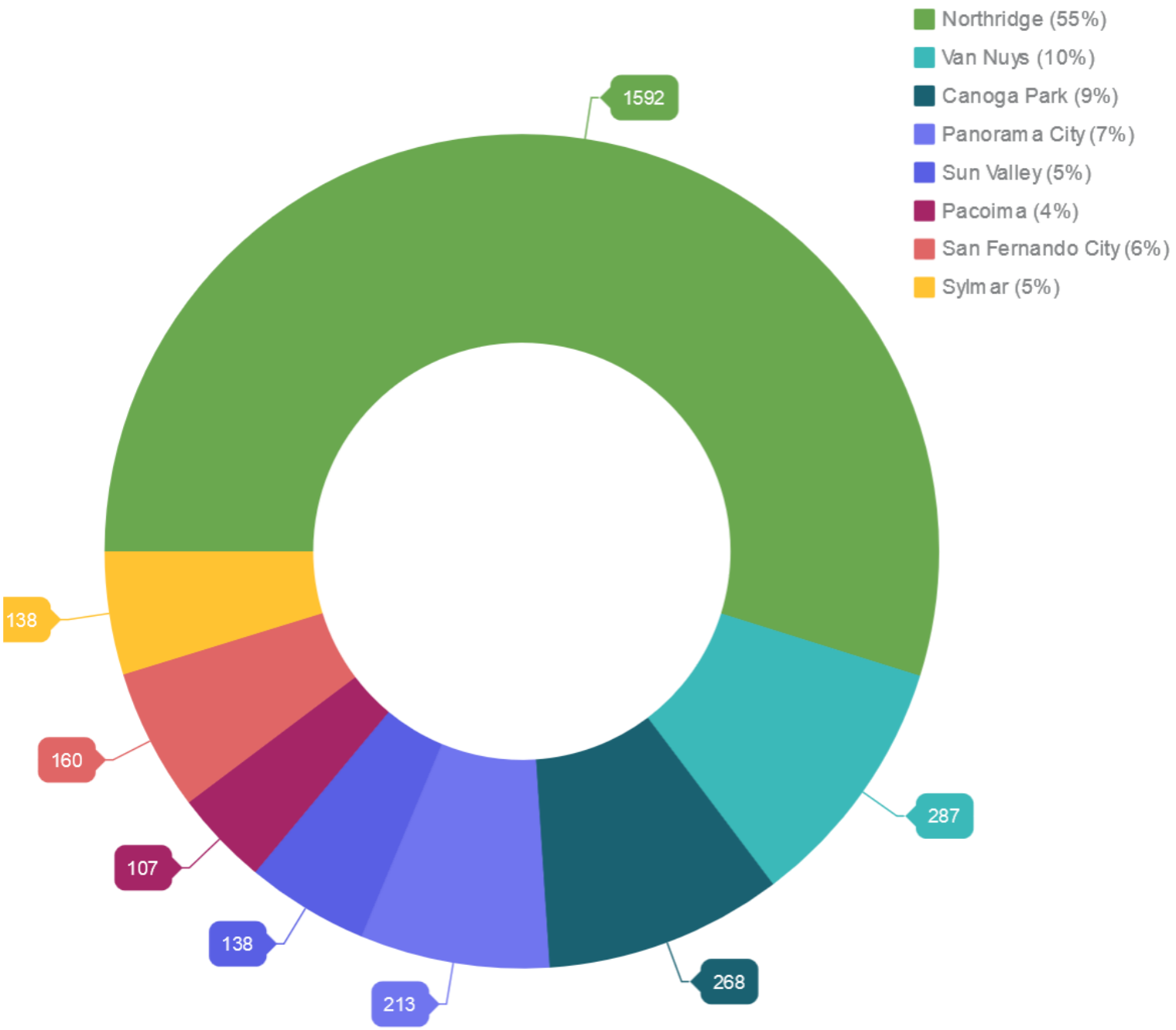


Federal and State Refunds

$3.6 Million



CSUN VITA is Growing:
Federal Tax Returns Prepared by Neighborhood



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An Army Veteran Makes a Difference at the CSUN VITA Clinic

Robert Sena, Supervisor

For as long as he can remember, CSUN accounting senior, Robert Sena loved numbers. Even as a child, he loved math, and the idea of doing taxes always intrigued him.

The 25-year-old Army Veteran started at CSUN in 2014, after receiving his Associate's Degree in accounting from the College of the Canyons. Sena initially attended business administration classes while he served in the military, but his passion for numbers eventually brought him back to accounting.

Sena began his work with the CSUN VITA Clinic during the most recent 2016 tax season as a Clinic Supervisor. Not only does his leadership role bring him the opportunity to help a wide variety of taxpayers, but also the student clinicians.

"I enjoy being a Supervisor and passing my knowledge on to the preparers. It is rewarding to train them to become supervisors in the next tax season, and also to know they can utilize what they learn here in future job interviews or careers," he said.

The main reason Sena appreciates his work is the satisfaction he gains in helping others. This was also his motivating factor in joining the Army. In the Military, he had the chance to serve as an engineer, designing and building bridges while stationed at Fort Hood.

Additionally, Sena also offers his experience as an Enrolled Agent. He passed his exam in 2014 and must renew his status annually. He is a great asset as an Enrolled Agent currently working for the VITA Clinic.

"I like that other students feel confident coming to me for advice because of my status as an Enrolled Agent. It is extremely beneficial because I get to see different tax returns and scenarios. Now that I'm dealing with many low-income families it makes me realize how much we can benefit them," Sena said.

His favorite part of working for the VITA clinic is helping the taxpayers get their maximum refund. Sena and his colleagues consistently go above and beyond when it comes to assisting taxpayers. One way he is personally able to do so is with his fluency in Tagalog.

"It was rewarding to help some of the taxpayers at the Van Nuys Library site who spoke Tagalog as their first language. I was actually able to make them feel comfortable doing their taxes with me as I spoke to them," he said.

Knowing that many of the taxpayers who visit the VITA sites would not necessarily have access to a tax refund and free tax services without the Clinic keeps him driven and inspired. Sena looks forward to helping others with their taxes for years to come.

GET INVOLVED

Individuals

Volunteer: Become a CSUN VITA Scholar in one of our remote sites

Spread the word: Tell your friends and family about the free tax preparation services offered by the CSUN VITA Clinic

Give: Support us by donating at vita.csun.edu

Connect: Follow us on social media

Organizations

Join: Become a VITA (Volunteer Income Tax Assistance) site for a day or for the season

Sponsor: Sponsor a CSUN VITA site with funding

Share: Tell your employees, clients or customers about our free tax preparation services

LEARN MORE

Go to http://vita.csun.edu

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FUNDING PARTNERS

WHO HELP MAKE OUR WORK POSSIBLE

WE ARE GRATEFUL

- **Bookstein Institute for Higher Education in Taxation**
- **The Department of Accounting & Information Systems**
- **The Nazarian College of Business & Economics**
- **CSUN's Division of Academic Affairs**
- **The City of Los Angeles**
- **The U.S. Treasury Department**
- **NEW Economics for Women**
- **City National Bank**
- **HCVT, LLP**
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FACULTY, STAFF AND VOLUNTEERS

Faculty:

Dr. Rafi Efrat

Professor Lucy Nalbandian

Staff:

Victor Mendez, Coordinator

Ara Kiledjian, Operations Supervisor

Dillon Karaan, Recruitment, Social Media and Marketing Specialist

Student Assistants:

Areli Araujo

Alejandra De La Torre

Gabriela Flores

Marlene Gonzalez

Lead Supervisors:

Boburkhon Abdullaev

Pauline Banzon

Jesse Collins

Ejay Delos Reyes

Anna Dilanian

Bridget FitzSimons

Hank Hsiao

Isaac Kang

Erica Levin

Nancy Lopez

Anna Mokrova

Kourtney Rodriguez

Natalie Tagle

John Villalobos

Gerson Zelayandia

Supervisors

Adam Abundis
Nicholas Aguirre
Angelica Ang
Artyom Avagyan
Bruna Belato
Isaac Blandon
Mario Brizuela
Michael Cooper
Mauricio Cos
Teresita Del Salto
Alejandra DeLaTorre
Cecilia Delgado
Sonal Dogra
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Alec Tejuco
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Bryant Tran
Mai Truong
Andrew Vaughn
Jennifer Velasquez
Glenda Villalta
Jon Wallach
Erik Wong

Preparers

Ayalah Adison
Golshad Afshari
Francisco Aguilera
Yelena Aladadyan
Yazmin Alalli
Arik Alfi
Afsaneh Aliesmaeili
Naira Amirkhanyan
Christian Anzueto
Mary Arakelyan
Alla Artyukhova
Aram Asatryan
Nicole Asensi
Delmy Asturias
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Sona Zograbian

THE BOOKSTEIN INSTITUTE

Bookstein Institute for Higher Education in Taxation
Nazarian College of Business & Economics
California State University, Northridge
18111 Nordhoff Street,
Northridge, CA 91330-8372
Phone: 818.677.3600
Email: vita@csun.edu
Web: vita.csun.edu

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