

Dear Volunteer,

As we approach the end of 2012, we have begun our preparation for the upcoming tax season. 2013 will be a year of transition and growth for the program as we expect to significantly increase our metrics again this year while setting the program up for long-term success and independence. In 2012 we completed over 1,500 tax returns, refunded \$2.1 million, and saved servicemembers \$239,000 in preparation fees. All of these metrics increased by 37% or more from our 2011 season. None of this could have been accomplished without your hard work and dedication to the program. Beyond the #'s, we have identified several goals for 2013 including:

- Identifying individuals to become Tax Site Coordinators responsible for managing volunteers and quality review at our sites.
- Consolidating all Schedule E and C tax returns to one location with the returns completed by an "A Team" group of experienced volunteers.
- Opening a Saturday site in Eastern Massachusetts to complement our Chicopee location. This is in response to both preparers and servicemembers requests to have more available appointments on the weekends.
- Creating a partnership with Bentley College to share best practices and volunteers with the universities' established free income tax preparation program.
- Partnering with Rhode Island and New Hampshire to establish similar programs in their states.
- Streamlining follow-up with taxpayers interested in asset-building opportunities.
- Increasing servicemember's awareness of tax concepts that affect them.

This year, the IRS decided to refrain from creating new training material and instead use the cases studies from last year. Because of this we will have separate training for *returning* and *new* volunteers. Training for all volunteers will be at the National Guard's former headquarters at 50 Maple Street, Milford, MA.

Returning Volunteers: 1 three hour session offered on **January 16th from 4 pm-7pm OR January 17th from 7:30 am – 10:30 am**. In this brief we will give a quick refresher on the program, talk about the upcoming season and how the planned changes to the program will affect our volunteers.

New Volunteers: 1 eight hour session offered on **January 15th from 9 am – 4 pm OR January 19th from 9 am – 4 pm**. In this brief we will introduce new volunteers to the program and start you towards completing your IRS tax certifications.

Please look at the dates listed above and decide which session you can make it to. We're lucky to have SGT Daisy Marroquin back with the program again this year and she will be coordinating the training sessions. **Please RSVP to SGT Marroquin at 508-233-7409 or daisy.l.marroquin.mil@mail.mil**.

The schedule tax site locations and days of operation for 2013 are as follows:

MONDAY	WEDNESDAY	THURSDAY	SATURDAY	SPECIAL DAYS
Cape Cod	Chicopee (every other) Reading Wellesley (A-Team)	Worcester (every other)	Chicopee Milford	Coast Guard Boston Natick Labs Newport Naval Quincy NOSC USS Constitution

Please review this schedule to determine what your volunteer availability will be. Currently the program has the following needs:

- **General Volunteers:** We can always use additional volunteers. Our Reading, Cape Cod and Chicopee locations in particular.
- **Intern:** Ryan Drew from Bentley was a critical part of the program last year as our resident intern. If you know any college juniors or seniors that are accounting or finance majors that would be interested in a spring internship with the tax program, please let us know.
- **Site Coordinators:** We need 2-3 individuals to act as Site Coordinators for our locations. These individuals would act as quality reviewers at our sites and be responsible for the tax site operations of the site during its hours of operations.
- **A Team:** We need 4 volunteers to work with Craig Zuckerman (our resident CPA) in Wellesley and 1LT Kelly Bennett (our Ernst and Young volunteer) in Milford to be part of our Advanced Team (A-Team) that will be solely responsible for preparing returns that include a Schedule E or Schedule C. You will be required to complete additional training for this role.
- **Administrative Volunteer:** The organization of the tax files and coordination of follow up took a solid 2 weeks of our time at the end of last year's tax season. We are looking for a volunteer to assist with organizing our files, making sure we have the required paperwork, following up with servicemembers that request contact from our asset building partners, and collecting data on our metrics. This person would volunteer at our Wellesley location

If you would be interested in filing one of these roles, please let us know. Or, if you know someone that might be a good fit for one of the roles, we would appreciate the connection. Thank you for your continued commitment to the program. We look forward to another successful year.

MAJ Shannon McLaughlin

Jon Harrington