



MCUCD Tax Training Schedule

The Tax Tele-Course: The Tax Tele-Course is a series of tax law trainings conducted over the phone and designed to teach volunteers how to prepare taxes at free tax sites across the state of Montana. The curriculum is based on IRS VITA training materials with each session lasting about an hour. Each session is recorded and archived at www.MontanaFreeFile.org for participants to listen to as many times as they want.

October Tele-Course: This Tele-Course will cover last tax season's materials. Because tax law changes minimally from year to year, this is a great introduction for new volunteers. A limited amount of training materials are available. Contact your local VITA coordinator for more details.

2011 October Tax Tele-Course								
Presented by Montana Credit Unions for Community Development								
The Tele-Course will be held from 9-10am on the following days:								
Mon Oct 17 th	Wed Oct 19 th	Mon Oct 24 th	Wed Oct 26 th	Mon Oct 31 st	Wed Nov 2 nd	Mon Nov 7 th	Mon Nov 14 th	Wed Nov 16 th
Program Overview	Exemptions	Income	Adjustments	Deductions	Non-refundable Credits	Refundable Credits	MT Form 2, Part I	MT Form 2, Part II

December Tele-Course—This Tele-Course will cover the 2011-2012 tax season materials. Training materials are available. Contact your local VITA coordinator for more details. *Dates are tentative, based on IRS release of new materials.*

2011 December Tax Tele-Course									
Presented by Montana Credit Unions for Community Development									
The Tele-Course will be held from 9-10am on the following days:									
Wed Nov 30 th	Fri Dec 2 nd	Mon Dec 5 th	Wed Dec 7 th	Fri Dec 9 th	Mon Dec 12 th	Wed Dec 14 th	Fri Dec 16 th	Mon Dec 19 th	Tues Dec 20 th
Program Overview	Exemptions	Income	Adjustments	Deductions	Non-refundable Credits	Refundable Credits	Optional—Advance Topics	MT Form 2, Part I	MT Form 2, Part II

TaxWise Online Training: This training is devoted solely to using the software we will use when preparing taxes onsite. Will be held Tuesday, January 10th, 10am-11:30am

* To sign up for the Tele-Course or any other trainings, contact [Rachael](mailto:Rachael@mcucd.org) at 1-800-745-5546 ext 142.

Other Training Opportunities: There are more training opportunities for VITA volunteers other than what MCUCD offers.

- **Link & Learn:** The IRS-sponsored online tax preparer training. This training is completely online and best-suited for independent learners. Visit <http://www.irs.gov/app/vita/> to get started.
- **Classroom Trainings:** Classroom trainings are offered in most major cities in Montana. Visit www.MontanaFreeFile.org to find out how to register for training in your region.

Credit Union Site Coordinator Training: All site coordinators are required to attend this training. Topics covered will include day-to-day VITA items as well as IRS-required materials.

1. Monday, January 9th, 9am-10am

Quality Review Training: This training is designated for volunteers who will provide over-the-phone support and quality review to volunteer tax preparers. Volunteer tax preparation experience and Advance Certification is necessary to become a Quality Reviewer.

1. Thursday, January 12th, 10am-11:30am

VITA Site Orientation Call: MCUCD will hold several calls before tax season begins to provide an orientation to volunteers. Volunteers will be required to attend only one of the calls. Dates and times will be released as tax season draws nearer.

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