

# MARYVILLE UNIVERSITY COURSE SYLLABUS INFORMATION

**SEMESTER/YEAR:** Spring / 2010

**COURSE INFORMATION:**

CLASS: ACCT / 470 / 1M TITLE: VOLUNTEER TAX PREPARATION

ADMINISTRATIVE MEETING: Friday, January 22 / 6:00 - 9:30 PM

OPTIONAL WORKING SESSION: Friday, January 29 / 6:00 - 9:00 PM

LOCATION: Main Campus / ABAC / 2245 CREDIT HOURS: 1 or 2

COMMUNITY SERVICE DATES: Saturdays – February 6, 13, 20, and 27  
8:30 AM – 4:30 PM

**PREREQUISITE:** ACCT 211 - Managerial Accounting

**REQUIRED TEXTS:**

- *Your Federal Income Tax for Individuals, For Use in Preparing 2009 Returns;* Department of the Treasury, Internal Revenue Service, Publication 17 (2009).
- Instructions for Forms 1040EZ, 1040A, and 1040.
- IRS Link & Learn Taxes e-Learning Website - <http://www.irs.gov/app/vita/index.jsp>

Note that all texts and additional materials are provided by the IRS, free of charge. Kim Temme, course instructor, will notify you when the materials are available.

**CLASS COMMUNICATIONS:** This course will utilize Maryville University email and the Desire2Learn (D2L) platform at <http://learn.maryville.edu>. It is your responsibility to have a Maryville University email account and check your email and the D2L course page on a regular basis.

**PRE-ASSIGNMENT:** Monitor D2L and your Maryville email account before class begins for additional guidance from your instructor.

**INSTRUCTOR INFORMATION:**

Instructor:	Kimberly Temme
Office Location:	ABAC 2208
Work Phone:	314-529-9639
Fax Number:	314-529-9975
Maryville Voice Mailbox:	314-529-9201 plus ext. 9639
Email Address:	ktemme@maryville.edu
Office Hours:	MW 11:00 AM – 12:45 PM; 2:15 – 3:30 PM

**COURSE DESCRIPTION:** This course is an overview of individual Federal and State of Missouri income tax return preparation, including filing status, appropriate tax forms and basic credits. This course requires you to perform tax preparation work on a volunteer basis. You will study the materials independently but receive “on-the-job” training when providing community service.

**COURSE OBJECTIVES:** The main objective of this course is for you to develop those skills required of a tax practitioner. You will acquire your knowledge through self-study of the course materials, with guidance provided by your instructor, and through meaningful, hands-on involvement. Specifically, after participating in the Volunteer Tax Program, you will be able to:

- Recognize the various tax documents that are used to prepare income tax returns, such as Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1098, SSA-1099 and 1099-B, and understand where to place the information on the tax return forms.
- Complete basic Federal and State of Missouri individual income tax returns.
- Understand the Missouri property tax credit and related tax forms.
- Assist others in preparing their 2009 income tax returns.
- Foster the oral and written communication skills necessary to succeed in a client-focused career.
- Develop judgment skills and the ability to “think on your feet.”
- Recognize the importance of client service, confidentiality, and customer relations.
- Demonstrate a commitment to community service in your own life.

**COURSE REQUIREMENTS:** You may take this class for either one or two credit hours. The four activities and grading scale are the same regardless of the number of credit hours. However, see the following sections of this syllabus (Test and Community Service) for specific requirements.

<u>Activity</u>	<u>Points</u>	<u>Points Earned</u>	<u>Letter Grade</u>
Administrative Meeting	15	≥ 90	A
Test (score ≥ 70%)	25	80 - 89	B
Community Service	45	70 - 79	C
Reflection	15	60 - 69	D
	<u>100</u>	< 60	F

**ADMINISTRATIVE MEETING:** We will have one mandatory class meeting on Friday January 22, from 6:00 to 9:30 PM. (Main Campus, ABAC 2245). At this meeting, we will cover administrative details and provide an overview of the Federal and Missouri individual income tax returns and the property tax credit.

**OPTIONAL WORKING SESSION:** Plan on attending this optional session on Friday, January 29, anytime from 6:00 to 9:00 PM (Main Campus, Room TBD). During this session, you may work on the test with other class members under the supervision of your course instructor and student assistants and ask any questions related to the test or other details about the course.

**TEST:** The test consists of short answer exercises and preparation of tax forms given various scenarios. Your instructor will distribute the test with your course materials. Note that the test is a take-home, open-book examination; you are allowed to use all tax resources, the help of other classmates and the optional working session on January 29 to answer the questions. If you choose to take this course for two credit hours, your test will include one or two advanced problems that will not be included in the test for those taking the course for one credit hour. **Turn in your completed test on or before Friday, February 26.**

**COMMUNITY SERVICE:** Our volunteer sites are the Rock Road (RR) and Florissant Valley (FV) Branches of the St. Louis County Library. To receive credit for this class, you will provide one day (for one credit hour) or two days (for two credit hours) of volunteer tax assistance on the following dates: Saturday, February 6 (RR); Saturday, February 13 (FV); Saturday, February 20 (RR); or Saturday, February 27 (FV). We will meet at the respective library at 8:30 AM for room setup and final instructions before preparing tax returns from 9:00 AM to no later than 4:30 PM. Directions to each library are on page 4 of this syllabus.

**REFLECTION:** The Volunteer Tax Preparation class is a service learning opportunity – an approach that takes classroom learning and combines it with community service. For this component of the course, you will reflect on what participating in this program meant to you and how you are incorporating your learning experience into your life. Your instructor will provide you with a series of questions to guide you in a written response.

**ACADEMIC ACCOMMODATIONS:** Maryville University provides accommodations and supports for students with disabilities as defined by the Americans with Disabilities Act. If you have a documented disability and wish to discuss academic accommodations, please contact your instructor and/or the Director of the Academic Success Center located in the University Library (314-529-6850).

THIS SYLLABUS IS SUBJECT TO CHANGE AT THE DISCRETION OF THE INSTRUCTOR. IT IS THE STUDENT'S RESPONSIBILITY TO STAY INFORMED OF SUCH CHANGES.

## **Volunteer Tax Preparation Directions to Site Locations**

### **St. Louis County Library - Rock Road Branch**

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Address: 10267 St. Charles Rock Road  
St. Ann, MO 63074

Phone: 314-994-3300 (SLCL switchboard)

Location: Approximately 2 ½ miles east of Northwest Plaza

Directions: From Maryville University, take I270 north to I70 east. Exit on Cypress and go south (left at stoplight). Stay on Cypress until it ends at St. Charles Rock Road. Go east/left on St. Charles Rock Road and continue through Ashby intersection. On north/left side of the road watch for the St. Ann City Hall and Police Department. Shortly after, turn north (left) on Industrial Drive.

### **St. Louis County Library – Florissant Valley Branch**

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Address: 195 New Florissant Road  
Florissant, MO 63031

Phone: 314-994-3300 (SLCL switchboard)

Location: At the entrance of Bangert Park

Directions: From Maryville University, take I270 north. Take exit 27 for New Florissant Road and travel north approximately 1.2 miles. The library will be on the left. The library and Bangert Park share a common entrance. Look for the large flag pole and military tank.