

**OBT 293**  
**VOLUNTEER INCOME TAX ASSISTANCE (VITA)**  
**SPRING 2010**  
**SYLLABUS**

Instructor:	Rich Palmer, CPA
Phone:	925-8730 (Valencia Campus)      E-Mail: rpalmer@unm.edu
Class Format:	Thursday    10:30 – 1:00 p.m., Room B127
Office Hours:	To Be Announced
Textbook:	<u>TAX HELP NEW MEXICO</u> 2009-2010 Problem Set
Supplies Needed:	Notebook, pencil and <b>calculator</b> . Always bring your textbook and supplies to class.
Attendance:	Please follow the attendance policy as stated in the current catalog. You may be dropped when your absences total <b>15%</b> and your grade average is <b>below 60%</b> .  If you are unable to attend class, it is <b>your responsibility</b> to withdraw before any deadlines. See the current catalog for information on dropping or withdrawing from class.
Grading:	91%-100%      = A 81%-90%       = B 71%-80%       = C 61%-70%       = D Below 60%      = F

A grade of "D" or "F" is not acceptable for courses required for graduation.

**OBT 293**  
**VOLUNTEER INCOME TAX ASSISTANCE (VITA)**  
**SPRING 2010**  
**SYLLABUS**

Grade Weighting:	Homework	= 40%
	Final Exam	= 20%
	Practical (Tax Return Preparation)	= 40%

You must volunteer at least 30 hours to receive the entire 40% Practical .

Your final grade is the weighted average of all the above.

Final Exam: IRS basic, intermediate and advanced certification exam.

Homework: Homework will consist of exercises and problems from your textbook (and online).

Planning: Plan and use your time wisely! Study and review your notes, textbook and online resources. Read each topic **before** it is covered in class; and most importantly, ask questions!

Special Needs: If you are a qualified person with disabilities, who might need reasonable accommodations in academic settings, please communicate with me as soon as possible so that we may make appropriate arrangements to meet your needs.

Snow Days: If the weather becomes bad and you are uncertain if your class will meet, call 925-SNOW for information.

Objective: Learn how to interview, prepare and electronically file a Federal and State Income Tax return.

This syllabus is subject to change.

**OBT 293  
VOLUNTEER INCOME TAX ASSISTANCE (VITA)  
SPRING 2010  
SYLLABUS**

<u>Week 1</u> Thursday, Jan 21	Module 1&2
<u>Week 2</u> Thursday, Jan 28	Module 3, 4 & 5
<u>Week 3</u> Thursday, Feb 4	Module 6, 7 & 8
<u>Week 4</u> Thursday, Feb 11	Module 9, 10 &11
<u>Week 5</u> Thursday, Feb 18	Module 12 & Exam Review
<u>Week 6</u> Thursday, Feb 25	Practical
<u>Week 7</u> Thursday, Mar 4	Practical
<u>Week 8</u> Thursday, Mar 11	Practical
<u>Week 9</u> Thursday, Mar 18	Spring Break

**OBT 293**  
**VOLUNTEER INCOME TAX ASSISTANCE (VITA)**  
**SPRING 2010**  
**SYLLABUS**

<u>Week 10</u> Thursday, Mar 25	Practical
<u>Week 11</u> Thursday, Apr 1	Practical
<u>Week 12</u> Thursday, Apr 8	Practical
<u>Week 13</u> Thursday, Apr 15	Practical
<u>Week 14</u> Thursday, Apr 22	Advanced Tax Topics
<u>Week 15</u> Thursday, Apr 29	Advanced Tax Topics
<u>Week 16</u> Thursday, May 6	Advanced Tax Topics
<u>Week 17</u> Thursday, May 13	No Class