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Auburn Students Help Working Families Save Money on Taxes

by Lindsey Kaye Rodgers / Writer

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Auburn students received recognition for their compassion and work ethic this tax season while working with SaveFirst, the largest volunteer tax preparation program in the state.

“SaveFirst, a program by Impact Alabama that trains student volunteers to help low income individuals prepare their tax returns,” said Keven Yost, associate professor of finance. “The result is that these individuals get their appropriate tax refunds without having to pay a tax preparation service.”

Auburn students in the College of Business have participated in SaveFirst for three years, and Yost said the faculty would continue to encourage students to take advantage of this opportunity.

According to the SaveFirst website, “Over 400 trained students from more than 10 campuses prepared tax returns for more than 2,600 families in 12 cities statewide: Birmingham, Montgomery, Mobile, Huntsville, Tuscaloosa, Bessemer, Gadsden, Tuskegee, Dothan, Decatur, Auburn and Marion.”

The program helped working families save more than \$4.7 million in tax refunds and more than \$670,000 in tax preparation fees.

Auburn’s 61 volunteers prepared more than 550 of these tax returns and saved \$154,000 in commercial tax preparation fees.

“I like the fact that our students can get some professional experience while helping those in the community,” said Claire Crutchley, associate professor of finance. “Most students who participate really enjoy the experience and feel like they gain confidence as well as feeling good that they are helping others with their skills.”

Faculty members offered incentives for students to participate in SaveFirst, and Crutchley said she had more students volunteer for SaveFirst than the program could train.

“I encouraged the other faculty teaching Advanced Business Finance to offer it to their students,” Yost said. “I do not require it, but allow students to participate for extra credit. I believe they get far more out of it than a few extra points.”

Yost said the SaveFirst volunteers had to complete a six-hour training program and take a test to be certified by the IRS as volunteer tax preparers.

After completing the training, the students volunteered at the SaveFirst site in Auburn or Montgomery for at least two hours per week for six weeks.

“The training was divided into two sessions, which were a couple of hours each,” said Frank Long, a senior in finance and accounting. “Both sessions contained a lot of material, but the instructors did a good job of emphasizing what the most important concepts were.”

A challenge SaveFirst encountered was making sure there weren't more volunteers than clients.

Crutchley said the program recruits families mainly by word of mouth, flyers, and visits to churches and other community events. They are hoping to facilitate more participation from families in the upcoming tax season.

“Overall, it was a good experience,” Long said. “During the training, I felt kind of overwhelmed and wondered if I would be able to remember how to do everything. Thankfully, the SaveFirst employee that oversaw the work site was very understanding and helpful in getting us volunteers started.”

Yost said he likes the SaveFirst program because it helps struggling individuals get free help and offers benefits for the students volunteering as well.

“The students get to interact with individuals who may be different than those they see in class and on campus, but live right around the corner,” Yost said. “They get to see how some people struggle on a level they probably never have, and they get experience interacting on a professional level with clients. They also get experience examining tax documents and returns, which can be helpful in future classes and work. I am a huge fan of this program.”

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