# Volunteer Income Tax Assistance (VITA) & Tax Counseling for the Elderly (TCE)

PARTNER
Template Toolkit

The templates in this toolkit have been created for official partners of the IRS to use as part of their outreach products, in support of IRS tax return preparation assistance. To keep IRS information consistent and official, we ask that you use these templates as part of your marketing of the VITA and TCE programs. The customizable templates can be used to assist with recruiting volunteers for sites and bring awareness to the availability of the services in the community.
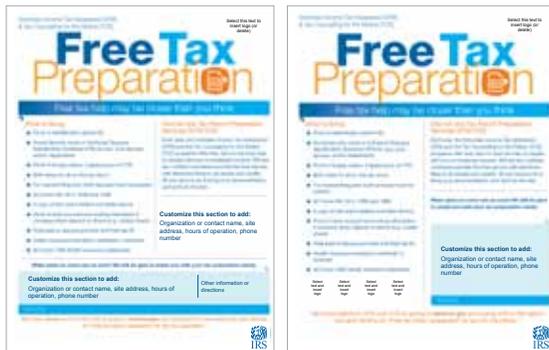
Thumbnails & Instructions
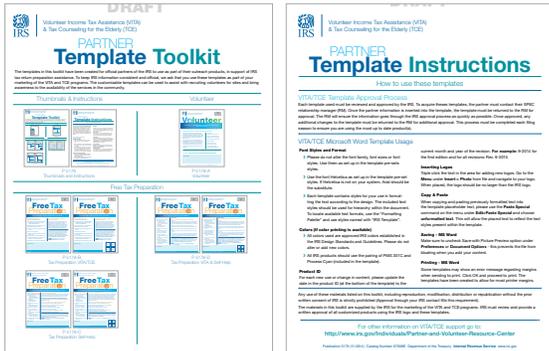
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Thumbnails and Instructions

Volunteer

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Volunteer

Free Tax Preparation

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Tax Preparation VITA/TCE

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Tax Preparation VITA & Self-Help

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Tax Preparation Self-Help

PARTNER
Template Instructions

How to use these templates

VITA/TCE Template Approval Process

Each template used must be reviewed and approved by the IRS. To acquire theses templates, the partner must contact their SPEC relationship manager (RM). Once the partner information is inserted into the template, the template must be returned to the RM for approval. The RM will ensure the information goes through the IRS approval process as quickly as possible. Once approved, any additional changes to the template must be returned to the RM for additional approval. This process must be completed each filing season to ensure you are using the most up to date product(s).

VITA/TCE Microsoft Word Template Usage

Font Styles and Format

❯ Please do not alter the font family, font sizes or font styles. Use them as set up in the template pre-sets styles.

❯ Use the font Helvetica as set up in the template pre-set styles. If Helvetica is not on your system, Arial should be the substitute.

❯ Each template contains styles for your use in formatting the text according to the design. The included text styles should be used for hierarchy within the document. To locate available text formats, use the "Formatting Palette" and use styles named with "IRS Template".

Colors (If color printing is available)

❯ All colors used are approved IRS colors established in the IRS Design Standards and Guidelines. Please do not alter or add new colors.

❯ All IRS products should use the pairing of PMS 301C and Process Cyan (included in the template).

Product ID

For each new use or change in content, please update the date in the product ID (at the bottom of the template) to the current month and year of the revision. **For example:** 9-2014 for the first edition and for all revisions: Rev. 9-2015

Inserting Logos

Triple click the text (select) in the area for adding new logos. Go to the **Menu** under **Insert > Photo** from file and navigate to your logo. When placed, the logo should be no larger than the IRS logo.

Copy & Paste

When copying and pasting previously formatted text into the template placeholder text, please use the **Paste Special** command on the menu under **Edit>Paste Special** and choose **unformatted text**. This will allow the placed text to reflect the text styles present within the template.

Saving - MS Word

Make sure to uncheck Save with Picture Preview option under **Preferences** or **Document Options** - this prevents the file from bloating when you add your content.

Printing - MS Word

Some templates may show an error message regarding margins when sending to print. Click OK and proceed to print. The templates have been created to allow for most printer margins.

Any use of these materials listed on this toolkit, including reproduction, modification, distribution or republication without the prior written consent of IRS is strictly prohibited (Approval through your IRS contact fills this requirement).

The materials in this toolkit are supplied by the IRS for the marketing of the VITA and TCE programs. IRS must review and provide a written approval of all customized products using the IRS logo and these templates.

For other information on VITA/TCE support go to:
http://www.irs.gov/Individuals/Partner-and-Volunteer-Resource-Center