

## WHAT IS TAX PRO BONO?

We represent low-income taxpayers with federal and state tax controversies and educate individuals about their rights and responsibilities as U.S. taxpayers. Pro bono attorneys primarily take on collections cases which maintain client financial security.

MECKLENBURG  
**ACCESS TO JUSTICE**  
PRO BONO PARTNERS



**Peggy and Whitney Lumas,  
Tax Clients**

## PRO BONO EXPECTATIONS:

Before: Advocacy Center staff determine case eligibility. We only refer eligible clients.

During: Meet with client in person or virtually to discuss their case. Complete necessary paperwork to assist client. Usually requires contacting IRS collections representatives.

After: Little to no follow-up work.

Time: 2-6 hours over a few months.

## YOU WOULD ENJOY TAX PRO BONO IF:

- You want to work directly with clients.
- You want to volunteer but have limited or inconsistent time to do so.
- You prefer pro bono areas that do not necessitate going to court.
- Continuous learning opportunities regarding tax law excite you.

## PRO BONO IMPACT:

Collections assistance removes wage garnishments, bank levies, and social security offsets that impair income security. Pro bono enables clients to take charge of their finances, reduce their tax liability, and learn strategies to prevent future tax issues from arising.

## TRAINING + SUPPORT

We offer trainings to attorneys outside of their practice area, including supplemental trainings for specific tax disputes. We also provide a tool kit with the necessary materials to take the case. The Advocacy Center staff provide ongoing assistance. Co-counsel is welcome and encouraged!

## WHY TAX PRO BONO?

"CCLA provides great training and guidance throughout the cases, the matters are fairly discrete, and it was an excellent way to get involved in pro bono work."-Allie Lin, Brighthouse Financial