

LIVE UNITED[®]



Make Work Pay: ***Regional Volunteer Tax Assistance Collaborative***

Nov 12, 2015

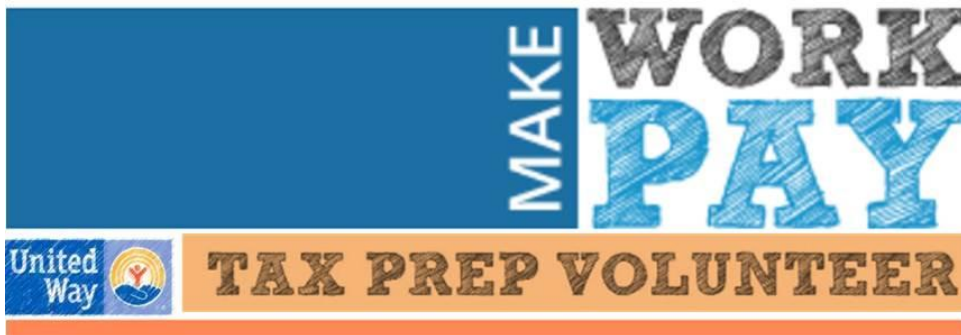
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Regional Volunteer Tax Assistance Collaborative

WHAT AND WHY?

Meet Basic Needs-Family & Work Supports

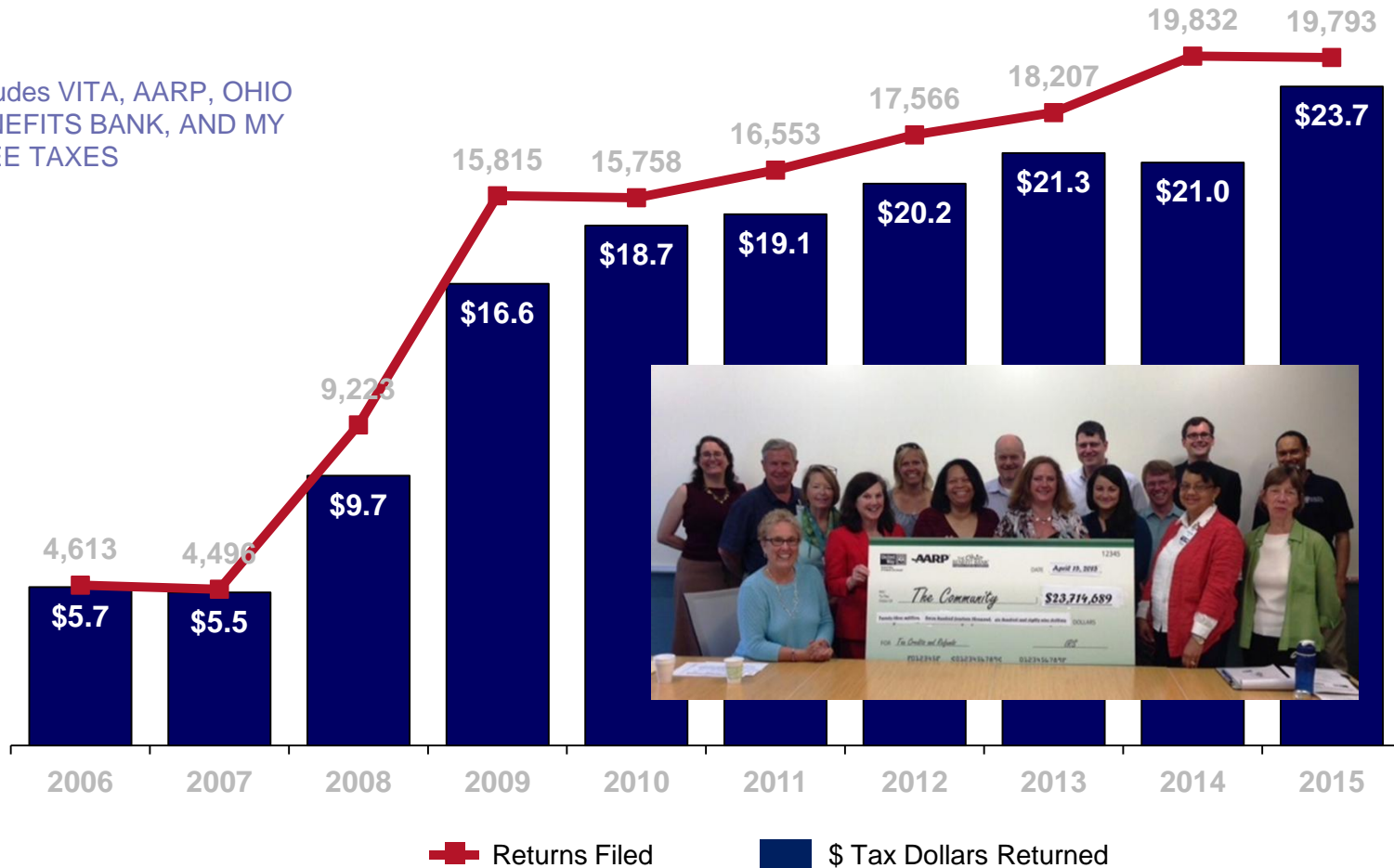
- Provide free tax preparation services to eligible wage earners throughout the region
- Earned Income Tax Credit – outreach to assure that eligible working families file for and receive tax credits to assets and alleviate poverty.
- Connect annual tax season services to financial education and stabilization services.



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Regional Results: OH-KY-IN

Includes VITA, AARP, OHIO
BENEFITS BANK, AND MY
FREE TAXES



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TELL CLIENTS: WHY VITA?

WHY FILE?

For households under the legal threshold for tax filing (\$10,150), it is often worthwhile to file:

- ✓ REFUND WITHHELD WAGES
- ✓ EARNED INCOME CREDIT AND CHILD TAX CREDIT
- ✓ AFFORDABLE CARE ACT PREMIUM TAX CREDIT
- ✓ PROOF OF INCOME FOR EDUCATION FINANCIAL AID (FAFSA)
- ✓ PROOF OF EARNED INCOME FOR IMMIGRATION STATUS



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TELL CLIENTS: WHY VITA?

WHY USE VOLUNTEER TAX ASSISTANCE?

- ✓ FREE: KEEP YOUR MONEY
- ✓ ACCURATE
- ✓ FAST REFUND THROUGH EFILE
- ✓ NO SALES/LOANS/SCAMS



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TELL CLIENTS: CHOICES

HOW TO FILE? THREE CHOICES:

1. File taxes online for free with myfreetaxes.com

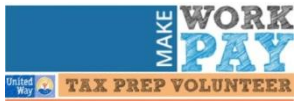
MyFreeTaxes is a United Way-supported free online service for filing federal and state taxes. *Users have access to one-on-one help through phone or chat.*

2. Tax coaching: facilitated self file.

Use MyFreeTaxes system to file your own taxes in a group setting with a trained tax volunteer coach. Classes are scheduled at Financial Opportunity Centers and community colleges in our region.

3. Volunteer tax preparation

- [VITA \(Volunteer Income Tax Assistance\)/ United Way](#)
- [AARP Foundation Tax-Aide](#)
- [Ohio Benefits Bank](#)



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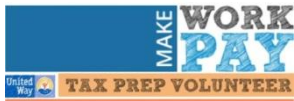
www.myfreetaxes.com



MyFreeTaxes.com

- ✓ Part of FreeFile alliance program
- ✓ Safe, secure, free online tool
- ✓ No sales/loans/gift cards/collateral sale items
- ✓ Federal AND state taxes
- ✓ Help Line (phone or chat)
1-855-MY-TX-HELP
(1-855-698-9435)
Answers phone and tax questions, staffed by specially trained 2-1-1 operators.

- ❖ *Comfortable with computers?*
- ❖ *Earn less than \$62,000?*



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What happens at a VITA Tax Site?



1) Taxpayer comes to tax site with required materials



2) **Greeter** checks taxpayer in, checks for required documents and ID



3) Taxpayer completes interview form



4) **Screener** reviews interview form with taxpayer to clarify details



5) **Tax Preparer** completes return using TaxWise software



6) **Quality Reviewer** reviews the return with taxpayer, prints out materials, hands a copy of the return to taxpayer.

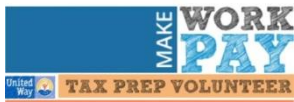


7) **Site Coordinator** e-files the tax return.

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How to find tax help?

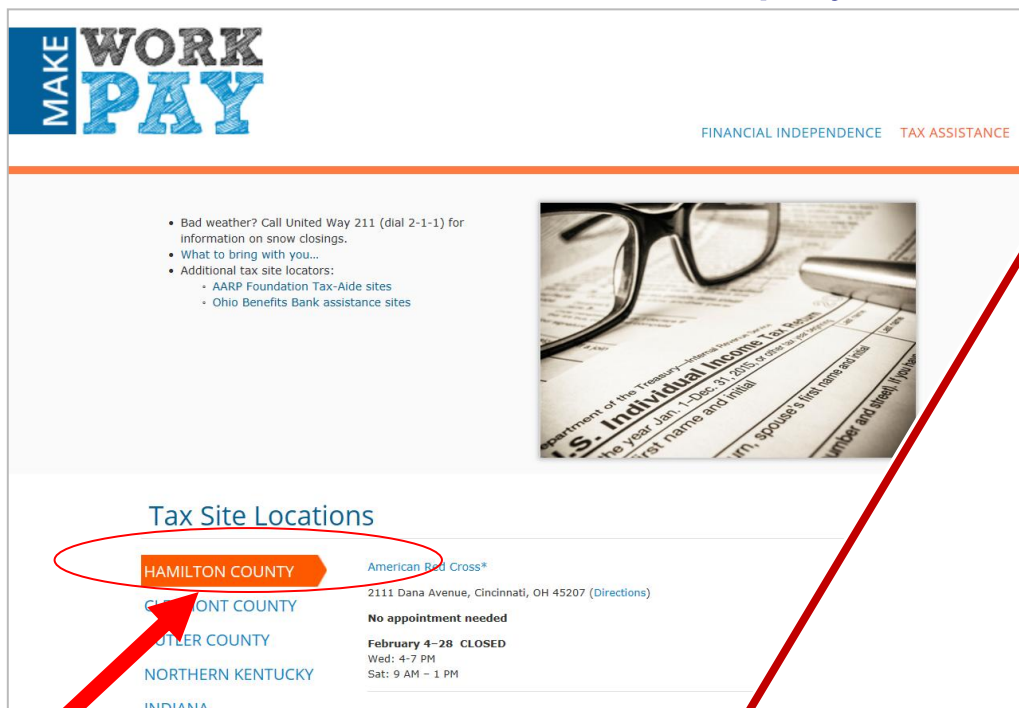
www.makeworkpay.com



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How to find tax help?


online: www.makeworkpay.com



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FINANCIAL INDEPENDENCE TAX ASSISTANCE

- Bad weather? Call United Way 211 (dial 2-1-1) for information on snow closings.
- What to bring with you...
- Additional tax site locators:
 - AARP Foundation Tax-Aide sites
 - Ohio Benefits Bank assistance sites



Tax Site Locations

HAMILTON COUNTY	American Red Cross* 2111 Dana Avenue, Cincinnati, OH 45207 (Directions) No appointment needed February 4-28 CLOSED Wed: 4-7 PM Sat: 9 AM - 1 PM
CLEVELAND COUNTY	
WHEELER COUNTY	
NORTHERN KENTUCKY	
INDIANA	

United Way • AIRS
2-1-1TM
Get Connected. Get Answers.

Or phone:
dial 2-1-1



QUESTIONS?

