



# FREE TAX PREPARATION PROGRAM VOLUNTEER INFORMATION SESSION

United Way of Greater Cincinnati



UNITE COMMUNITIES TO CHANGE LIVES.

**That's what we do. That's who we are. That's what it means to LIVE UNITED.**

# WHY DOES UNITED WAY DO TAXES?

- What is VITA?
- What is EITC?
- What is the collaborative?



# VITA: VOLUNTEER INCOME TAX ASSISTANCE

A national  
**VOLUNTEER**  
program  
assisting  
families at  
tax time



**FREE TAX  
PREPARATION!**



# EITC AND CTC

EITC and CTC are tax credits designed to promote work and to lift families out of poverty.

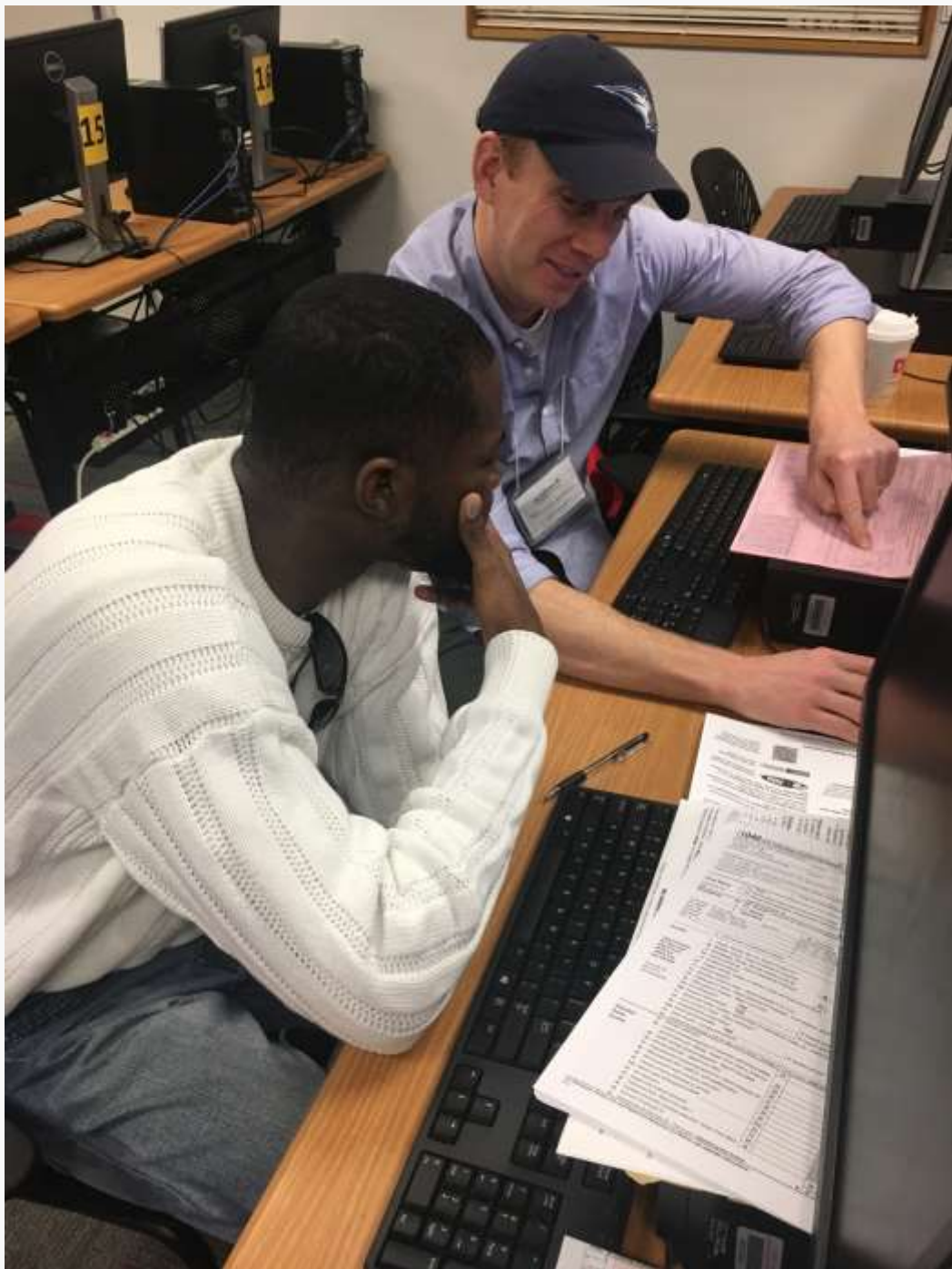
They are only available to people who file federal tax returns.

- EITC (EIC): Earned Income Tax Credit/  
Earned Income Credit
- CTC: Child Tax Credit/  
Additional Child Tax Credit
- American Opportunity Tax Credit/  
Lifelong Learning Credit
- Retirement Credits...
- Advanced Premium Tax Credit

# WHY VITA AND EITC?

- Families depend on refund of tax credits and withheld earnings to meet their basic expenses.
- Filing taxes is a legal obligation for almost everyone.
- Tax Prep requires reading, interpretation and computer competency.
- **For-profit tax preparation services can be expensive!**
- Some for-profit and online services entail predatory loans and deceptive practices.





# WHY VITA AND EITC?

We can connect annual tax season services to financial education and stabilization.

# WHY VITA AND EITC?

Tax returns are required to access:

## HEALTH:

- health insurance premium credits

## EDUCATION:

- student financial aid (FAFSA)

## HOUSING

- home mortgages

## FINANCIAL STABILITY

- many government benefit programs.





# WHY VITA AND EITC?

Tax Refunds & Credits returned  
money to the local community.  
\$22.5 Million in 2018!

## **Thank you!**

Your support yielded more than  
\*\$109,095 of Child Tax Credit — an  
amount worth \*6600 bags of gro-  
ceries— to our community's grow-  
ing families!

\* A statistic of the Northern Kentucky Area Building Coalition's Tax Refund Online production report  
of April 30, 2015. A bag of groceries costing \$16.41 in Kentucky.



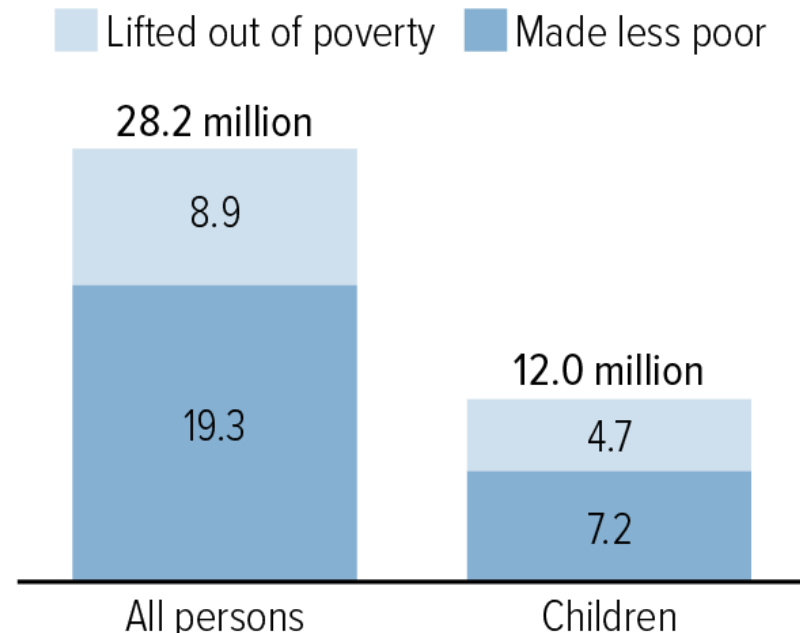
# FROM THE BROOKINGS INSTITUTION

“The EITC has garnered bipartisan support over the years because research shows it effectively encourages work, reduces poverty, and has long-lasting positive effects on outcomes for low- and moderate-income families and children.”

# FROM THE CENTER ON BUDGET AND POLICY PRIORITIES

## Earned Income Tax Credit and Child Tax Credit Have Powerful Antipoverty Impact

Millions of persons lifted out of poverty or made less poor (using Supplemental Poverty Measure) by EITC and CTC, 2016



# REGIONAL TAX ASSISTANCE COLLABORATIVE

- **VITA (United Way of Greater Cincinnati)**
- **MyFreeTaxes (Online)**
- **AARP SW OH**
- **AARP NO KY**
- **OH BENEFIT BANK**

# MYFREETAXES

MAXIMUM INCOME  
LIMIT \$66,000

**myfree**  
**taxes.com**



Easy. Safe. Free.  
Tax help you can trust.

**myfree**  
**taxes.com**

# Reading High School- MyFreeTaxes First Time Filers

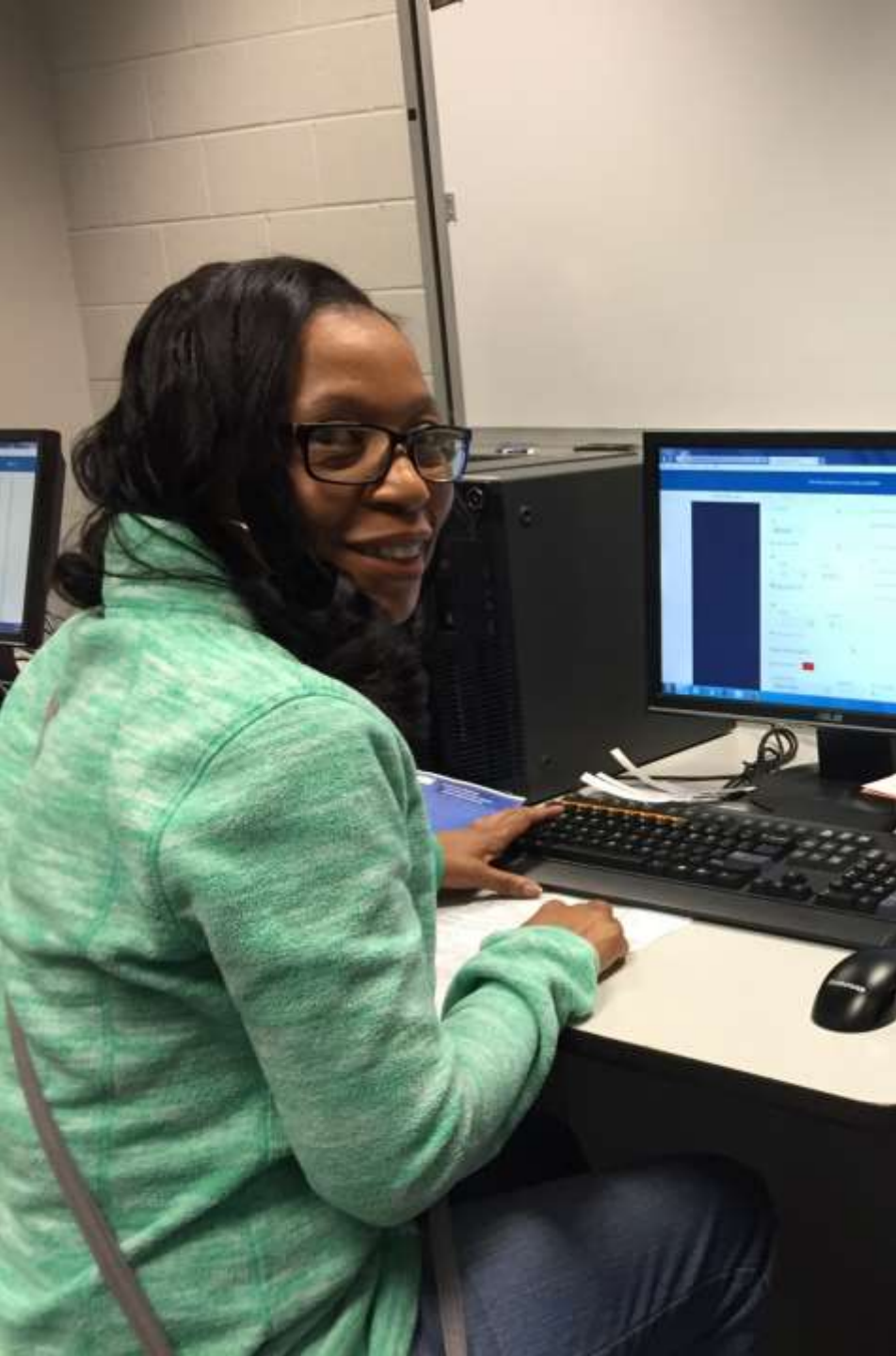


| 2018              | RETURNS       | EIC %      | Total Refund Dollars | Sites     | Volunteers |
|-------------------|---------------|------------|----------------------|-----------|------------|
| VITA              | 8,187         | 25%        | \$9,982,721          | 31        | 457        |
| MyFreeTaxes       | 1,881         | 25%        | \$2,666,681          | 4         | 5          |
| AARP, SWO         | 7,535         | 8%         | \$6,312,636          | 24        | 197        |
| AARP N KY         | 1,070         | 13%        | \$968,693            | 5         | 36         |
| OHIO BENEFIT BANK | 1,851         | 33%        | \$2,575,659          | 29        | 53         |
| <b>TOTAL</b>      | <b>20,524</b> | <b>19%</b> | <b>\$22,506,390</b>  | <b>93</b> | <b>748</b> |
| @ \$277/return    | \$ 5,685,148  |            |                      |           |            |

# WHAT MAKES A GOOD TAX VOLUNTEER?

- Personable and friendly
- High ethical standards
- Enjoy solving puzzles
- Willing to ask questions
- Enjoys computers
- No math needed





# VOLUNTEER OPPORTUNITIES

## INDIVIDUALS

- Greeters
- Tax Preparers
- Tax Reviewers
- Tax Coaches
- Interpreters
- Technology Help
- Site Coordinators

# VOLUNTEER OPPORTUNITIES



## TEAMS

- Team Building
  - Corporate Engagement
  - Community Investment
  - Continuing Education
  - Fulfilling the Mission
- Recruiting and training
    - Lunch and Learn/Info Sessions
    - Training Classes
  - Volunteer as a group
    - Adopt-a-site
    - Corporate Community Site
    - Peer Closed Site

# TIME COMMITMENT

## TRAINING Classroom & online:

November  
12 hours  
Fridays of

## TAX S

January 2

## MINI

At least 3  
Each shif



ays available)

LIVE UNITED™

# QUALITY AND CERTIFICATION

## IRS CERTIFICATION

- Online and classroom training
- Certification is an annual online IRS test
- More complex than actual tax returns
- Up to 18 CEUs for CPAs, CFAs and Attorneys
- Certified volunteers are protected from liability

## ASSURING QUALITY

- Strict code of ethics
- New volunteers shadow experienced volunteers
- Multiple volunteers review each return
- Experienced coordinator onsite

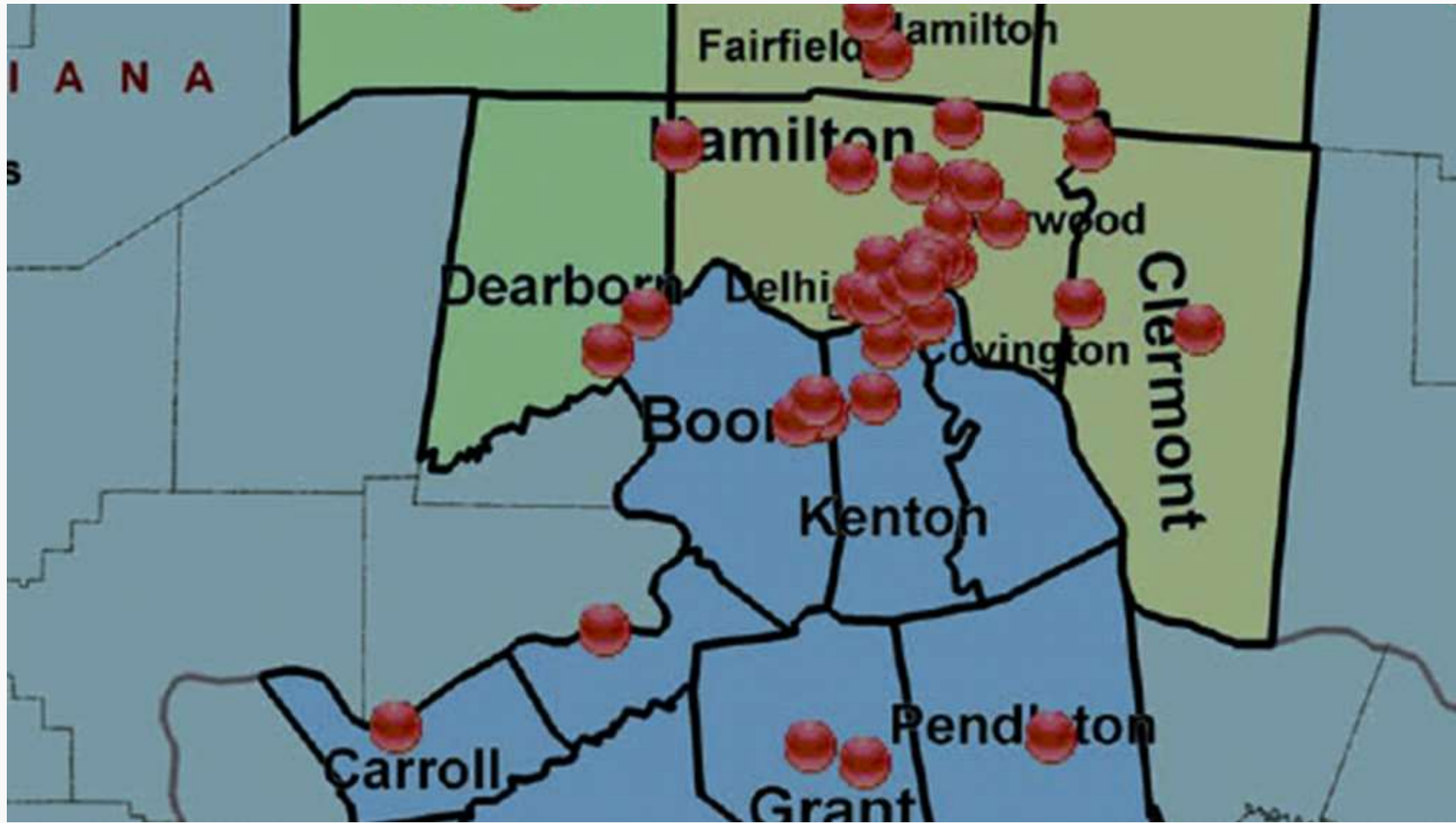


### **Volunteer Protection Act**

Public Law 105-19, Volunteer Protection Act of 1997 (VPA)

*Protects volunteers from liability for acts they perform within the scope of their responsibilities as a volunteer.*

# REGION



# WHEN AND WHERE

## Ohio:

- **Hamilton County:** Bond Hill, Evanston, Finneytown, Harrison, Madisonville, Millvale, North Avondale, Price Hill, Springdale, Over-the-Rhine.
- **Butler County:** Fairfield, Middletown
- **Clermont County:** Mt. Carmel, Loveland

Indiana: Aurora, Lawrenceburg

Kentucky: Newport, Covington, Florence, Williamstown

[www.makeworkpay.com/tax-assistance/tax-site-locations](http://www.makeworkpay.com/tax-assistance/tax-site-locations)

# WHEN AND WHERE

Mondays 4-7, 5-8

Tuesdays 2-5

Wednesdays 2-5, 3-6, 5-8

Thursdays 4-8

Saturdays 9-1, 10-2, 10-3



# WHAT HAPPENS AT A TAX SITE?

- Greeting
- Intake/Screening
- Tax Preparation
- Quality Review
- Print
- E-filing





# NEXT STEPS- INDIVIDUALS

1. sign up: complete a sign up form:  
[www.makeworkpay.com/volunteer/volunteerguide](http://www.makeworkpay.com/volunteer/volunteerguide)
2. Sign up for training classes:  
[www.makeworkpay.com/volunteer](http://www.makeworkpay.com/volunteer)
  - One day class
    - Introduction to vita
    - Taxslayer software navigation and testing
  - Half day class:
    - Multi-state
    - Aca
    - Self employment
3. Certify online:  
<https://www.linklearncertification.com/d/>
4. Schedule and volunteer
5. Celebrate!



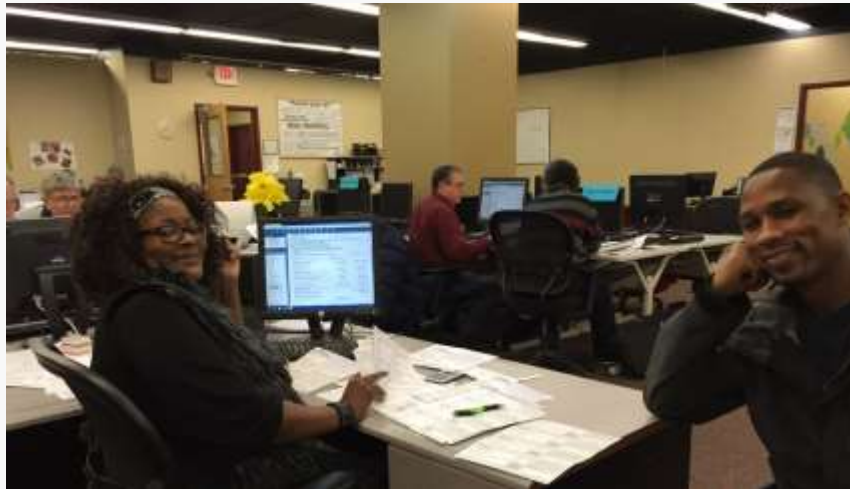
# NEXT STEPS- GROUPS

1. WHERE do we want to serve?
2. HOW MANY volunteers do we anticipate?
3. Planning Meeting
4. Recruitment
5. Training and Testing
6. Group Scheduling
7. Recognition and Celebration



# 2018 VITA TAX VOLUNTEERS CELEBRATION!





QUESTIONS

THANK YOU

