

UNITED WE THRIVE

Free Tax Prep
Information Session

United Way of Greater Cincinnati





We fight for the economic well-being of all people in Greater Cincinnati so our entire community can thrive – now and in the future.





Volunteer Income Tax Assistance (VITA)

A national volunteer program assisting families at tax time since the early 1970s. The program is authorized by the Department of Treasury and administered by the Internal Revenue Service (IRS).

Why: Earned Income Tax Credit and Child Tax Credit



- EITC and CTC are tax credits designed to promote work and to lift families out of poverty. **These credits are only available to people who file federal tax returns.**
- EITC and CTC together lifted **10.6 million people above the poverty line** and made poverty less severe for 17.5 million others in 2018.
- The IRS estimates that 20% of eligible families do not claim EITC, either because they do not know they can, or they do not file a tax return.



Some of our Sites & Partners



BRIGHTON CENTER
A COMMUNITY OF SUPPORT

Ohio
MEANS
Jobs.

Butler County
A proud partner of the
American Job Center network



SANTA MARIA
COMMUNITY SERVICES™
Helping Families Help Themselves Since 1897

the
healingcenter.



**NORTHERN KENTUCKY
Community
Action
Commission**

Ohio
MEANS
Jobs.

**Cincinnati -
Hamilton County**
A proud partner of the
American Job Center network

**Community
Action Agency**
CINCINNATI | HAMILTON COUNTY



**Cincinnati
Recreation
Commission**

C
The Center
for Great
Neighborhoods



**cincinnati
public
library**
Hamilton County

NORTHMINSTER



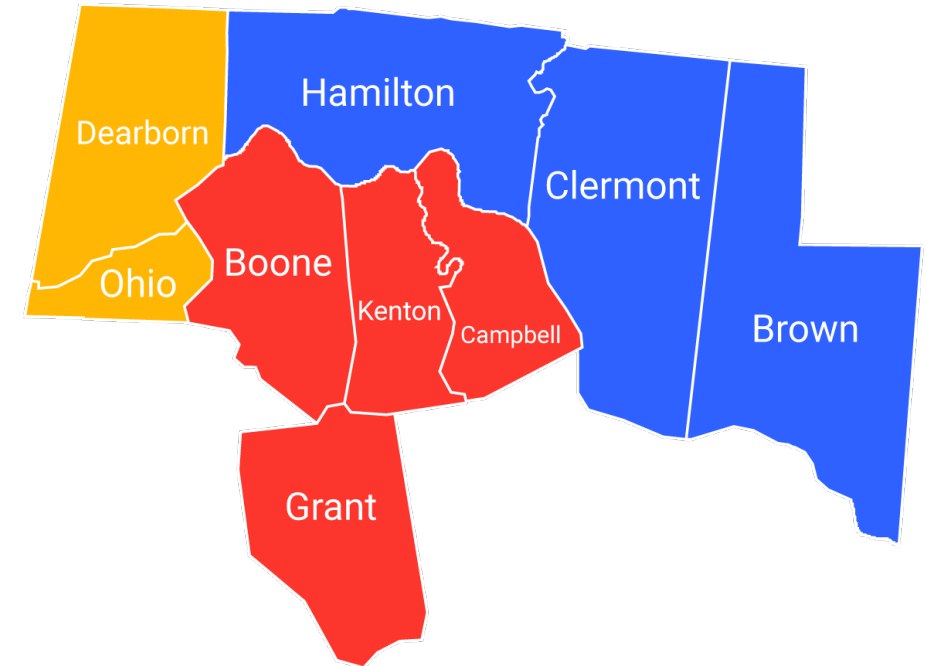
Our Region

United Way of Greater Cincinnati serves communities in 9 counties:

- Hamilton, Brown, and Clermont counties in Ohio
- Boone, Campbell, Grant, and Kenton counties in Northern Kentucky
- Dearborn and Ohio counties in Southeast Indiana

Free Tax Prep also serves:

- Gallatin and Pendleton counties in Northern Kentucky
- Butler county in Ohio



There are always opportunities to explore adding new site locations!

Our Results

Calendar Year	Returns	Fees Saved	Refund \$ Returned to Community	Volunteers
2021	6,948	\$1,858,923	\$10,747,731	346
2023	7,772	\$2,129,875	\$8,847,011	398
2024 (through May)	8,227	\$2,262,425	\$9,113,691	422

What makes a great tax volunteer?



- Personable and friendly
- High ethical standards
- Comfortable working with a diverse group of taxpayers
- Willing to ask questions
- Enjoys computers, software systems, and learning new skills



Volunteer Opportunities

- Greeters & Screeners
- **Tax Preparers & Quality Reviewers**
- Site Coordinators



WELCOME

UNITED WAY
FREE TAX
PREP SITE

WE LOVE TO DO TAXES FOR FREE!
Visit UWGC.org/tax-assistance



Your Volunteer Pathway: From today through Tax Season



**Today:
Information Session**

Watch the Tech Training Video
(will be available soon)

Volunteer Training Session A

Volunteer Training Session B

Take IRS Online Certification
Tests

Volunteer at a Tax Site

Optional Returning Volunteer
Training

Optional Special Topics
Training

Volunteer Time Commitment

TRAINING:

December & January dates for virtual training

- **Tech training video, Part A, & Part B**
- **Will be recorded & posted online**

TAX SEASON:

End of January 2025 – April 15, 2025

COMMITMENT:

Three shifts per season. Each shift is 4-6 hours on a weeknight or Saturday (some weekdays available).

Quality & Certification

IRS CERTIFICATION

- Certification is a series of annual, online IRS tests
- CEs for CPAs, CFAs, & other tax preparers
- 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.



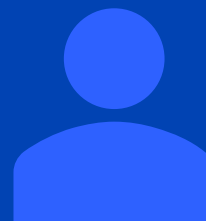
In-Person Service

Traditional Face-to-Face Service



Drop-Off In-person

Taxpayers completing paperwork separate from volunteers; returns prepared primarily on site with taxpayers waiting in separate space



Drop-Off Virtual-Hybrid

Administered with volunteers scanning taxpayers' documents; volunteers preparing off-site and taxpayers returning later to retrieve paperwork



Next Steps...

1. Share your contact information at <http://www.uwgc.org/tax-volunteer>

- Sign up on our webpage
- You can also find our recordings of the Information and Tax training videos here for your reference.

2. Register for Training

- Visit our Eventbrite page in the next two weeks to schedule for training sessions, <https://www.eventbrite.com/e/free-tax-prep-training-part-a-tickets-1067852348119>
- When it becomes available, view our **New Volunteer Tech Training Video** to set up your software accounts and continue your volunteer journey.

3. Start Studying:

- The best place to get started is on the Prosperity Now website, <https://prosperitynow.org/vita-train>. TY23 is still showing but this is a great place to start before our training in December and January.



Questions?

Thank You

For being our partner in supporting the economic well-being of individuals & families across our region.