

# United is *the way* to help | Free Tax Prep

The UWGC Free Tax Prep Program is one example of how we help families directly by assisting those eligible to file their taxes and saving approximately \$250 in tax preparation fees per year. Many working families are also eligible for the Earned Income Tax Credit (EITC), which can increase refunds by up to \$5,000.

## FREE TAX PREP PROGRAM IN ACTION

In 2019, United Way of Greater Cincinnati's Free Tax Prep initiative:

- Helped individuals and families access more than \$15 million dollars in refunds
- Helped file nearly 10,400 federal and state tax returns for low to moderate income individuals
- Saved taxpayers more than \$2,800,000 in tax preparation fees
- Engaged 495 volunteers

## HOW THE PROGRAM WORKS

Community members can choose from one of three options to complete their taxes:

- MyFreeTaxes.com is a free to low-cost, secure, and mobile-optimized website available for families and open to all income levels. Sponsored by United Way and powered by H&R Block, MyFreeTaxes.com offers a tax helpline (866-698-9435) and is supported by IRS-certified operators.
- Volunteer Income Tax Assistance (VITA) is free, in-person tax filing support for individuals and families through trained and certified volunteers at sites throughout the region. VITA services were only available by appointment at select locations in 2020 due to COVID-19.
- Virtual Preparation is a new virtual process for taxpayers to safely submit their personal tax information electronically, launched in response to the challenges of COVID-19. In 2020, certified tax volunteers prepared and filed online tax returns for free.

Each service provides IRS trained and certified volunteers to assist the community in understanding their tax situations and maximize their refunds.

Additionally, United Way of Greater Cincinnati advocated for the enactment of the federal VITA Permanence Act and EITC benefits. This ensures that the IRS volunteer income tax assistance program will continue to be funded in the federal budget, supporting free tax prep services for low to moderate income households.

In Ohio, United Way also advocated to improve access to the Ohio Earned Income Tax Credit program for families across the state of Ohio.



United Way  
of Greater Cincinnati

**FREE TAX  
PREP**

# United is *the way* to help working families.

## 2020 VITA TAX SEASON | VITA VOLUNTEER



What a strange tax season it was. When it started, there were already news reports of a virus outbreak in China. But for us, it was business as usual.

We operated normally until March 9, when Ohio Governor Mike DeWine issued a state of emergency and a “stay at home” order was issued by state medical director Dr. Amy Acton.

As the days continued, Governor DeWine made guarded statements to caution people that this state of lockdown could go on until we saw a turnaround in the infection rate, possibly into mid-May. This turned out to be wishful thinking.

On March 16th, site coordinator Keith Gehring issued a communication that he and Sophia Scott, Financial Stability & VITA Program Manager at United Way of Greater Cincinnati, had decided that the VITA site in Fairfield would not operate until at least April 1.

With the closure of non-essential businesses, unemployment peaked at 14.7% in April – the highest since the Great Depression. Clients of the United Way of Greater Cincinnati VITA tax program are often at high risk for unemployment.

While waiting for the “stay at home” order to be lifted, we mulled several options that might allow us to reopen prior to the April 15 filing deadline. Fortunately, the IRS announced on March 21st that they were extending the filing and payment deadline to July 15, which allowed us to further refine our contact-less service options.

Although several VITA tax prep sites did not reopen, our Fairfield location was able to open and provide services on June 3. While some clients seemed to miss the in-person experience, the majority were grateful to sit and wait in their cars.

Inside, volunteers saw a more relaxed atmosphere than normal (pre-COVID-19) protocols. They had a little more freedom to consult one another and get quick help, making the preparation a little more efficient.

The Fairfield OMJ location continues to be a great partner for the United Way VITA program. OMJ processed more than 615 returns for the season, a new site record.

## FOR MORE INFORMATION

For more information about Free Tax Prep or to become a volunteer, visit [uwgc.org/freetaxprep](https://uwgc.org/freetaxprep) or contact Sophia Scott by email at [freetax@uwgc.org](mailto:freetax@uwgc.org) or call 211.