

UNITED WE THRIVE

Free Tax Prep Information Session

November 2025



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



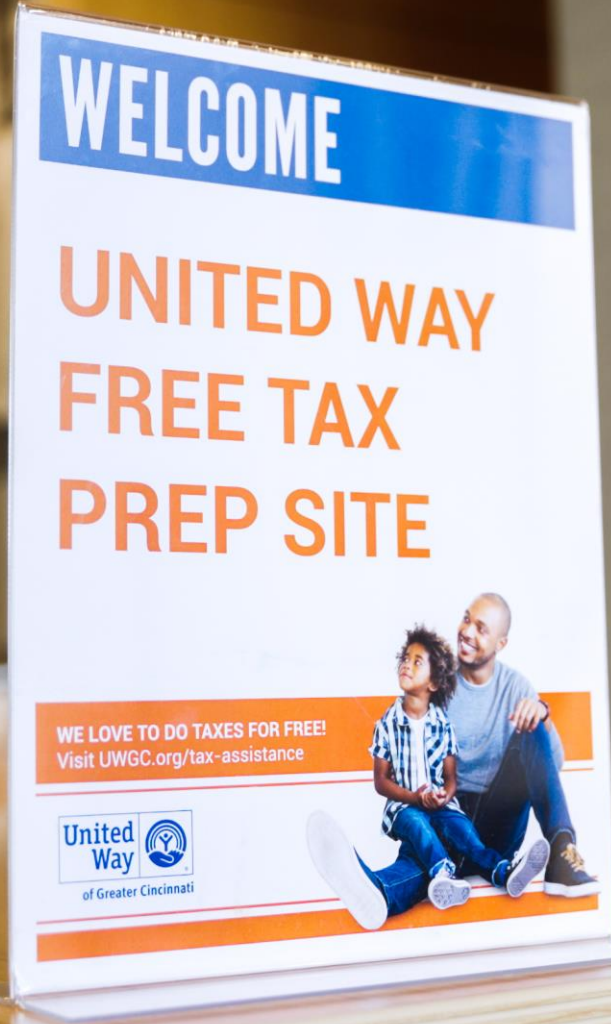
Volunteer Income Tax Assistance (VITA)

- 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.**
- In 2024, 23 million people filed for EITC, receiving a total of \$64B to help lift them out of poverty.
- 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



CAC

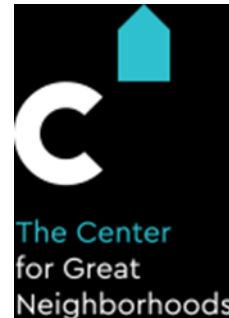
NORTHERN
KENTUCKY
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Cincinnati -
Hamilton County

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Community
Action Agency
CINCINNATI | HAMILTON COUNTY



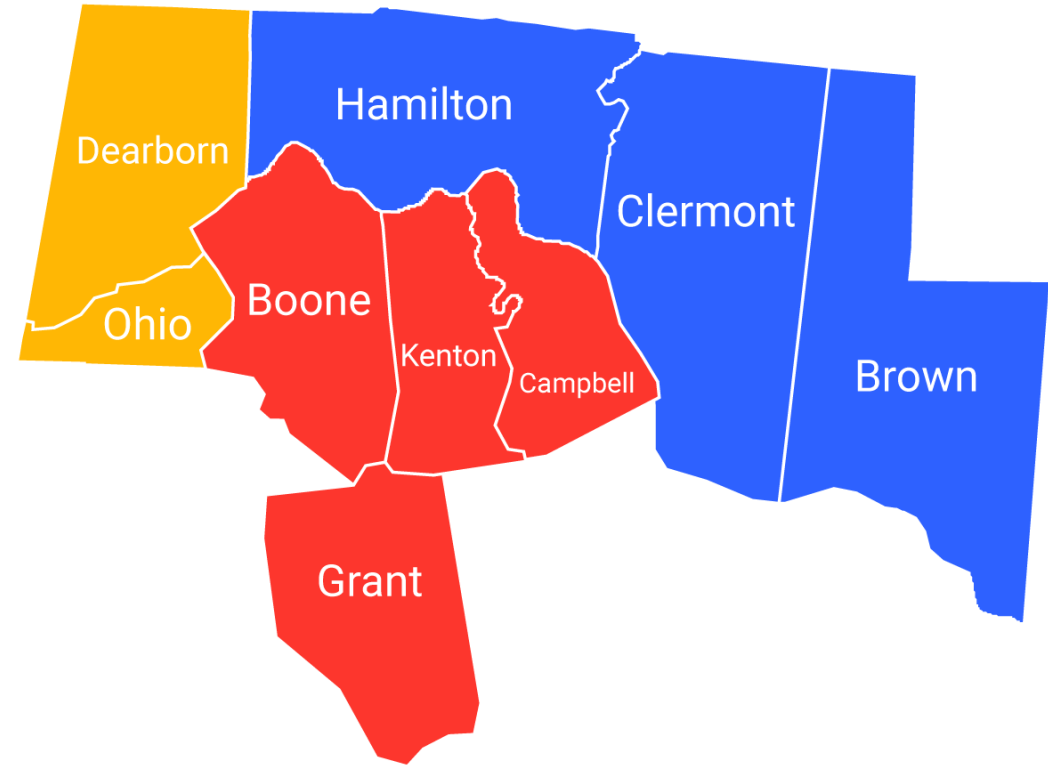
Our Region

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
2023	7,745	\$2,129,875	\$9,087,099	397
2024	8,474	\$2,330,350	\$9,738,363	422
2025 (through April 22)	9102	\$2,503,050	\$10,277,843	515

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

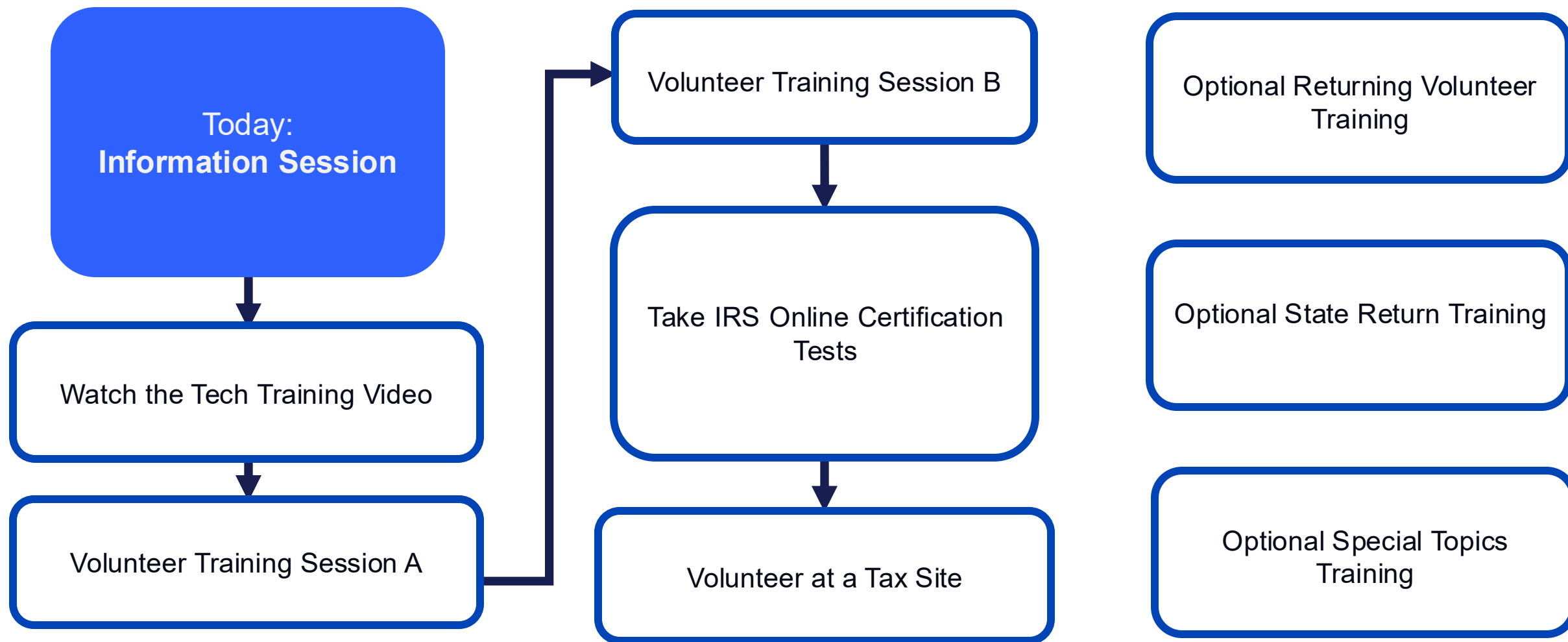




Volunteer Opportunities

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

Your Volunteer Pathway: From today through Tax Season



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 2026 – April 15, 2026

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.

FTP Site Framework

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. Register for Training

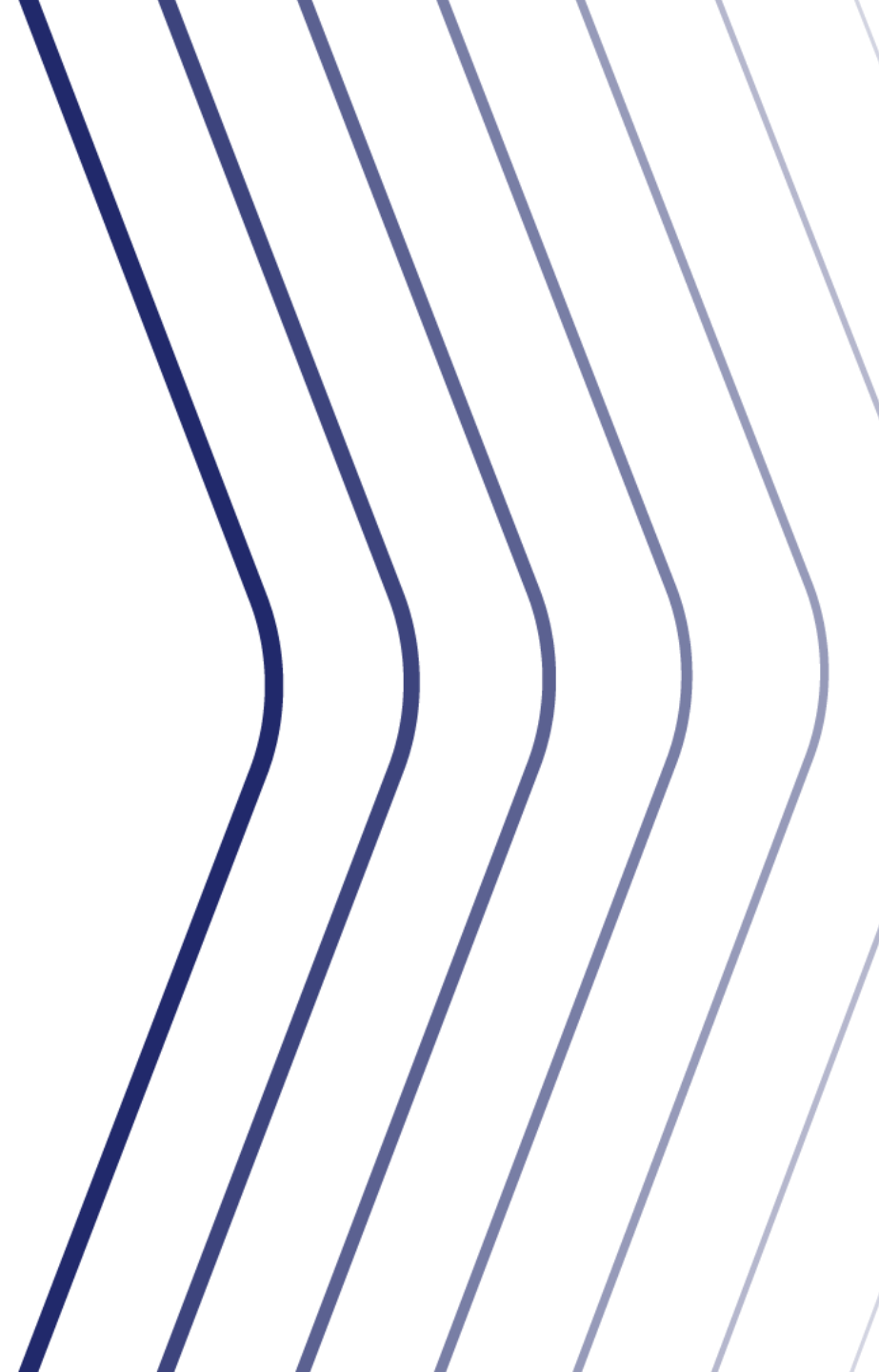
- Visit our [website](http://uwgc.org/tax-volunteer) (uwgc.org/tax-volunteer) to sign up for Training Part A and Part B if you haven't already done so.

2. Review our [New Volunteer Tech Training Video](#) to set up your software accounts and continue your volunteer journey.

3. Start Studying by using any of these self-study guides:

- [IRS Link and Learn](#)  – interactive training platform to teach tax topics
- Prosperity NOW's VITA-Train – currently being updated
- [Vita Resources](#)

Questions?





UNITED WAY
Greater Cincinnati