

UNITED WE THRIVE

Free Tax Prep Information Session

2027



**We empower
everyone in our
region to achieve
economic well-being
so our entire
community can
thrive — now and in
the future.**





What is Free Tax Prep?

- United Way's Free Tax Prep program is part of the IRS **Volunteer Income Tax Assistance (VITA)** program.
- Free Tax Prep helps families access valuable tax credits, including the **Earned Income Tax Credit (EITC)** and **Child Tax Credit (CTC)**.
- **Volunteers make this work possible!**

Make an Impact

Last year more than 500 volunteers helped:

- File almost **9,300 returns**
- Save **\$2.5 million in preparation fees**
- Claim more than **\$11.1 million in refunds**



Become a Tax Preparer

- **Most volunteers serve as Tax Preparers**, preparing returns and helping ensure they're accurate.
- **No previous tax experience is required.** United Way provides training, IRS certification support, and opportunities to shadow experienced volunteers.
- You can volunteer with a **friend, spouse, or coworker**, and supporting roles are also available for those who prefer a different way to help.



Who Makes a Great Volunteer?

Volunteers may already have many of the skills needed to succeed, including:



Customer Service



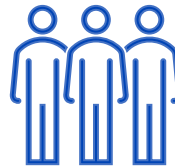
Communication



Attention to Detail



Problem Solving



Collaboration



Willingness to Learn

What You Gain From Volunteering



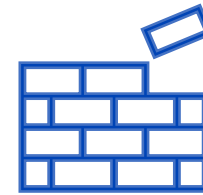
Use Your Experience

Put professional and personal skills to work in a meaningful way.



Grow Your Network

Meet and socialize with professionals, community members, and fellow volunteers.



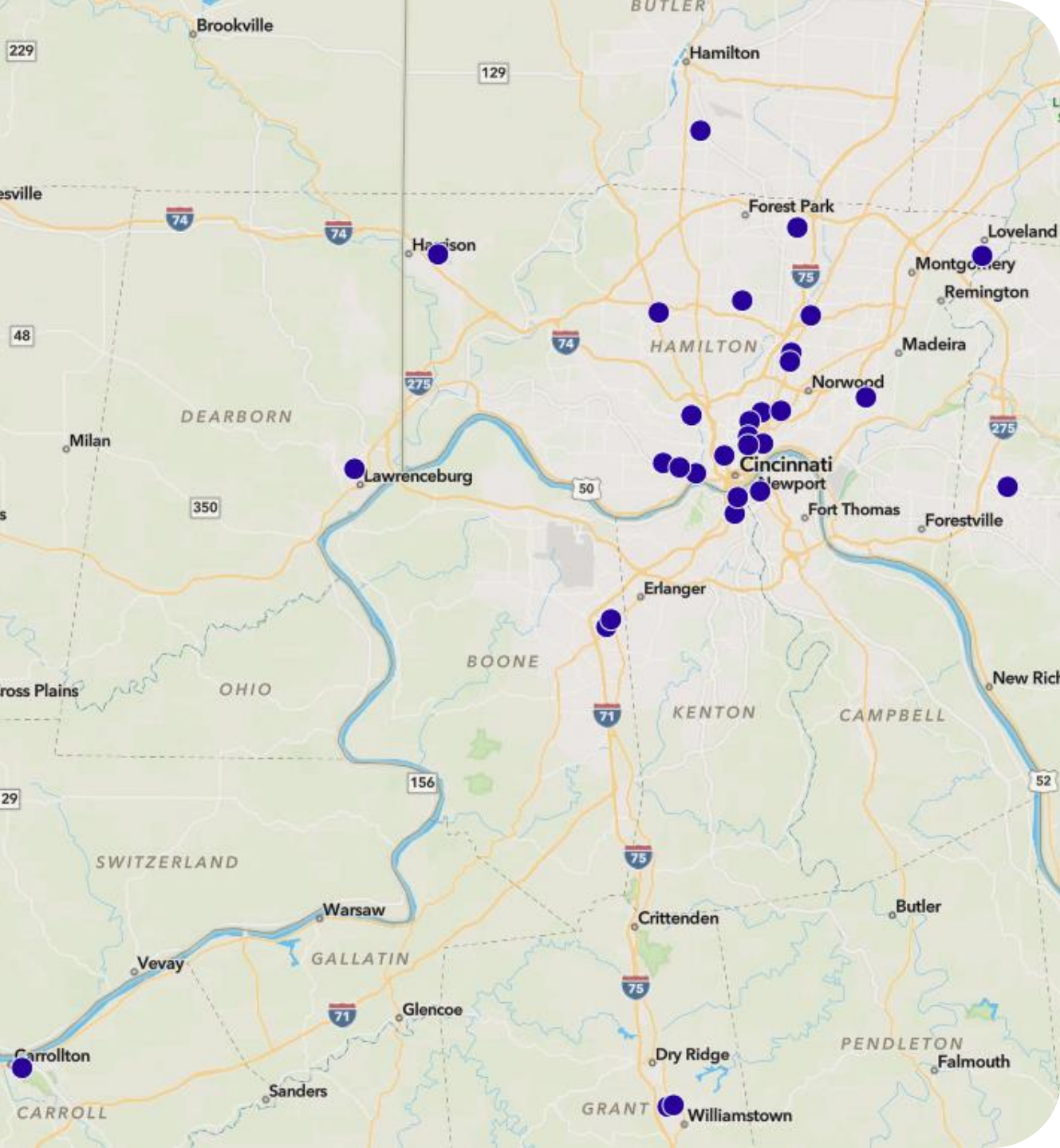
Build Your Skills

Gain hands-on experience and strengthen your resume.



Earn CE Credits

Eligible tax and finance professionals may earn continuing education credits.



Choose When & Where You Volunteer

- Volunteers can choose from more than **30 Free Tax Prep sites** in the region.
- **Virtual volunteering** is also **available** for those who prefer to help remotely.

Volunteer Time Commitment

Trainings & Certification:

8-12 hours total from December to January

Live virtual sessions and recordings available.

Tax Season:

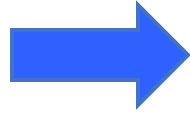
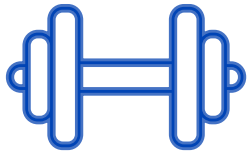
End of January 2027 – April 15, 2027

Commitment During Tax Season:

3-5 shifts from end of January through April 15

About **4-6 hours per shift**.

How It Works



Train

Complete virtual training to prepare for certification.

Certify

Pass the IRS certification tests required for your volunteer role.

Volunteer

Choose the sites, shifts, or virtual opportunities that work for you.

United Way provides guidance and resources every step of the way!

Ready to Make an Impact?

- Help families across the Greater Cincinnati region access the refunds and tax credits they've earned.

[Sign up to volunteer](#)

- Questions? Join us for office hours:

- Nov. 5 – 10-11 a.m.
- Nov. 17 – 12-1 p.m.
- Dec. 3 – 2-3 p.m.
- Dec. 15 – 12-1 p.m.
- Jan. 7 – 12-1 p.m.

[Join office hours](#)





UNITED WAY
Greater Cincinnati