

UNITED WE FIGHT.
UNITED WE WIN.

LIVE UNITED

EITC and Volunteer Income Tax Assistance

Take the stress out of tax season and let us handle the paperwork.



United Way
of Racine County





Welcome

Agenda

- Welcome
- What is VITA
- Understanding EITC
- VITA services

What is VITA?

- Volunteer Income Tax Assistance (VITA) is a national program staffed by local volunteers to provide **free** preparation and electronic filing of tax returns.
 - Several thousand sites nationwide
 - Prepares and files around 3.5-4 million returns each tax season
 - At or above a 94% accuracy rate
- **United Way of Racine County VITA focuses on assisting low-to-moderate income individuals and families**
 - **Individuals with disabilities**
 - **Limited English speaking taxpayers**
- Together with the IRS and community stakeholders, we promote tax credits such as the Earned Income Tax Credit (one of the nation's most popular and effective poverty-reduction programs), Child Tax Credit and others.

Earned Income Tax Credit (EITC)

Four out of five workers claim and get the EITC they earned. We want to make sure all eligible workers do not miss out on thousands of dollars every year because they fail to claim EITC. Our goal is to reach out to potentially qualifying workers, educate them about the credit, and motivate them to file and claim it and get it. This includes workers who:

- Live in rural areas
- Are self-employed or have income from a farm or business
- Are disabled
- Have no qualifying child
- Are not proficient in English
- Are older (grandparents)
- Have no filing requirement
- Are recently divorced, have reduced income, are unemployed, or are experiencing other changes to their marital, financial, or parental status

EITC Continued

- Nationwide during 2021, 25 million eligible workers and families received about \$60 billion in EITC
- The average amount of EITC received nationwide was about \$2,411

- In Wisconsin during 2021, 350,000 EITC claims were processed providing \$748 million in EITC credit.
- The average amount claimed was \$2,243

EITC Continued

EITC is for workers whose income does not exceed the following limits in 2021:

- \$51,464 (\$57,414 married filing jointly) with three or more qualifying children who have valid SSNs
- \$47,915 (\$53,865 married filing jointly) with two qualifying children who have valid SSNs
- \$42,158 (\$48,108 married filing jointly) with one qualifying child who have valid SSNs
- \$21,430 (\$27,380 married filing jointly) with no qualifying children who have valid SSNs

** Investment income must be \$10,000 or less

EITC continued

- Take the credit you're due. The EITC credit ranges from:
 - \$11 to \$6,728 with three or more qualifying children
 - \$10 to \$5,980 with two qualifying children
 - \$9 to \$3,618 with one qualifying child
 - \$4 to \$1,502 with no qualifying children
- If you qualify for EITC, you must file a federal income tax return and claim the credit to get it, even if you owe no tax or aren't required to file a return. To learn more visit www.irs.gov/eitc.

Are you asking yourself

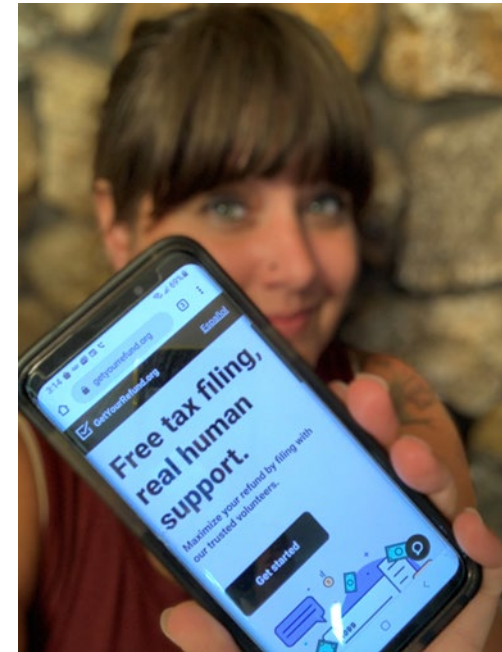
How can I get help filing my taxes for free?

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VITA is here to help!

- 2022 VITA will offer a variety of service options.
 - 3 physical sites for drop-off and in-person services
 - 100% virtual services through GetYourRefund
 - DIY free TaxSlayer software through MyFreeTaxes
 - Travel VITA team brings our services to employers, organizations and groups that can't make it to us – See our [FAQ page](#) for more info and to request promotional materials for at your location.



In-person services

- Appointment required for both full-service and drop-off
- Schedule online at www.unitedwayracine.org/vita or use the automated phone system 262-383-2555
- Income limit of \$66,000
- Federal and Wisconsin returns (including Homestead only returns)
- Can assist with returns back to 2016
- Appointment scheduler available in English and in Spanish
- Spanish speaking preparers available – Select “Tax preparation – Spanish” to book an appointment with a bilingual preparer
- Precautions put in place at all sites. Masks must be worn by both volunteers and participants.

100% Virtual

- Virtual tax team made up of local, IRS certified, vetted volunteers are ready to help
- Provide documents and personal information securely from the comfort of your own home
- Income limit of \$66,000
- Federal and Wisconsin returns (includes Homestead only returns)
- Can prepare returns back to 2018
- Allows contact with the client via email, text or phone
- Provides a secure site for clients to send tax documents
- Easiest from a smart phone or tablet

MyFreeTaxes (DIY)

Access our free TaxSlayer software through MyFreeTaxes.

- Income limit of \$73,000
- No form restrictions
- 2021 Software
- Certified volunteers available to answer your tax questions via email

This is the right option for you if:

- You are only filing for the current tax year
- You are filing a state return other than Wisconsin
- You are comfortable using online tax services
- You have done your own taxes in the past but want a more affordable (FREE) option
- Your tax situation is simple/straight forward
- You need a quick option

Let VITA help you file for free!

Visit

www.unitedwayracine.org/vita

for more information or to select your tax
service

VITA

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“The VITA program went above and beyond. I was distraught and VITA helped me to find what I was eligible to claim on my tax return.”

- 2021 and 2022 UWRC VITA client