

VOLUNTEER INCOME TAX ASSISTANCE

EarnIt!KeepIt!\$aveIt! (EK\$) is an initiative of **United Way Monterey County** focused on providing realistic solutions to increase the financial stability and economic independence of individuals and families.

Volunteer Income Tax Assistance (VITA) is the first program piloted under EK\$. In partnership with the IRS, VITA trains and certifies volunteers to provide free tax prep to low-to-moderate income households. Available at sites throughout the county and online, VITA helps tax payers claim all the credits for which they qualify.

United Way’s VITA Program Gets Results for the Community

Program Year	Volunteers	Number of Sites	Returns Completed	Refunds Claimed	EITC \$ Claimed
2016	128	9	2,595	\$3,599,215	\$1,376,538

Impact Potential – There is still more work to be done.

EITC Eligible Households	Unclaimed EITC Payments	Unclaimed EITC Returns	Average EITC Credit Unclaimed
48,880	\$21,666,750	12,220	\$1,733

From, “Left on the Table”, a report from California Department of Community Services and Development (2012)

➔ The estimate of unclaimed EITC returns is obtained by dividing the total amount of unclaimed EITC payments by the estimated average credit owed to eligible EITC recipients. The average received credit is multiplied by 75% to obtain a more accurate picture of the average credit owed to eligible EITC recipients who failed to claim the credit.

Profile of VITA Tax Prep Clients



UWMC focuses on the building blocks for a good quality of life .

66%	◆ Hispanic/Latino filers
57%	◆ Female filing Single or Head of Household
47%	◆ Are repeat customers for the VITA program
16%	◆ Less than a High School Diploma or GED
\$23,100	◆ Average Adjusted Gross Income of VITA clients