



### VITA: "Powered by Grace"

Once again, the United Way of Charlotte County's Volunteer Income Tax Assistance (VITA) program provided residents the opportunity to get their taxes done for free and set records doing it. In its sixth year, the program offered free tax help to people who generally make \$66,000 or less, be they persons with disabilities, the elderly or limited English-speaking taxpayers who need assistance in preparing their own tax returns. It was a great year!

VITA is a program that finds its success in the collective work of the volunteers, Steven Vito, who helped lead the program, noted the following: "As you can imagine "doing taxes" is probably not very high on most people's list of ways to volunteer. Believe it or not, most of our volunteers return year after year...not because they love taxes and numbers *but because they love people.*" "The reward is significant, all paid in smiles and hugs from grateful clients...many of whom have used the service for 4, 5 and even 6 years...the impact is real, and it's all powered by grace. The grace of our partners like the United Way of Lee, Hendry, Glades and Okeechobee and the Charlotte County Public Schools, the grace of our sponsors Centennial Bank and Trinity Financial, and most importantly, the grace of our volunteers and their families who unselfishly serve (or share their family members who volunteer) for 10 weeks each tax season."

Angie Matthiessen, Executive Director of UWCC, describes the work of the dedicated volunteer core who also stepped in to support the effort on the telephone. "We welcomed them for as many hours as they were able to provide to both answer phones and make the appointments. It was a great opportunity to help others and made a positive difference in our community."

Forty volunteers took the necessary training to become certified to prepare the qualified returns. It did not take long to hear the results of all of that hard work as the clients chose to comment again and again. "Some of the nicest people I have ever met" describing the volunteers from one taxpayer's perspective. "They do a perfect job" another claims. Still others noted that the volunteers "helped ease my fears and everyone was welcoming, friendly, and helpful." They always go out of their way to make sure everything is correct, even with unexpected complications." Finally, "I am grateful to have someone who is trustworthy taking care of my taxes for me," and "United Way helps people all over."

There was acclaim for the simple fact that the volunteers treated everyone with a great deal of respect and kindness. People with a nagging fear of knowing "we don't know what we are doing but the volunteers sure do." Fear associated with getting things wrong is relieved by the patience and grace of the tax preparing volunteers. It is obvious from the remarks that people appreciated the volunteers tremendously. One comment card sums it up quite well- "these are the nicest people that do the taxes-so nice that you almost don't mind paying taxes!" They must be good!

The VITA program was designed to help simplify the preparation process for those who qualify. It is not meant to provide all help to all people. Individuals with Schedule C losses and other disqualifying situations simply need to contact and see a professional preparer for assistance with their more complicated returns.

It is notable that in the five prior program years combined, there were 1,100 returns filed in total. This year, a total of 589 returns were filed, mostly through e-filing. It is estimated, since this is a free program, that at least \$121,628.00 was *not* spent to cover tax preparation costs. Combine the fact that there is significant tax-preparation cost savings, as well as the secure e-filing, the VITA program provides the maximum calculation of all appropriate and applicable credits and deductions on each return. This year, the total amount refunded to the participants was \$542,984.00. In addition, they logged the largest EIC (Earned Income Credit) award for the clients this year. At this year's pace of providing free tax preparation along with the amount of refunds provided, the program has proven both its need within our community as well as a huge economic impact upon its participants and community.

The thirty-eight percent increase in the number of program's participants featured an age range of 16-95-year old's, with the average age of 64. There is a great deal of emotion attached to income tax filing, and many are motivated to come in and make appointments because they feel obliged to do it right, the first time. Others faced the hardship of the loss of a loved one this past year who took care of everything while they were alive and now the remaining spouse is left to handle things they never handled before. Many were referred by friends and relatives who had taken advantage of the free service years before and were completely satisfied by the well-run and well-administered process again this year.

The United Way of Charlotte County is dedicated to eliminating poverty and considers the VITA program one of the tools in their toolbox. According to Director Matthiessen, "45% of the county's households are living month-to-month, paycheck to paycheck. These folks, deemed Asset Limited Income Constrained Employed (ALICE), need this service more than ever." She goes on, "The folks in our community who are working paycheck to paycheck are those who are working really hard and they deserve the chance to get their taxes done in just as professional a manner as the person who can pay for tax preparation services."

Helping one another lies at the core of most of what the United Way of Charlotte County engages in on a daily basis. This particular program, tailored to fit around the tax-filing calendar, shows us all how well-meaning people can come together to reach out to one another and simply help each other out in the human equation. We are thankful for the 40 volunteers who served nearly 5,000 hours in 10 weeks just for this program alone. This doesn't even count all of the other programs of the United Way of Charlotte County focuses on.

Once again, United Way of Charlotte County has found a way to bring people together, and to make this a "win-win-win" situation for the entire community. This is but one way that people can volunteer to make a difference and truly make what is already a great place to live even better. It will take work, but perhaps working together by "Living United" leads us to a place of grace we simply never have visited before.

If you are interested in being involved with the Charlotte County VITA program, please call 941-627-3539.