

VOLUNTEER INCOME TAX ASSISTANCE

VITA

United Way



A UNITED WAY COLLABORATIVE

THE NEED IN CHARLOTTE COUNTY



10% OF CHARLOTTE COUNTY HOUSEHOLDS

live at or below the Federal Poverty Level

VITA serves low-income tax payers who might otherwise struggle to afford the costs associated with filing their income taxes. 31 volunteers provided 2,573 hours of their time to serve our community.

In 2022, the adjusted gross income of the clients served was \$26,233. A \$300+ tax preparation fee could keep an individual from buying groceries or needed medications that month.



30% OF CHARLOTTE COUNTY HOUSEHOLDS

are above the FPL yet still struggling to meet their basic needs

THE IMPACT FOR TAX SEASON 2022 (Tax Year 2021)

Total Economic Impact of VITA Program*

\$1,200,513

15% increase from Port Charlotte & Punta Gorda sites' economic impact in 2021

	Total Tax Returns Accepted	Increase in Total Refunds	Earned Income Credit	Total Child Tax Credits
Port Charlotte	397 returns (8% increase from 2021)	24% increase	\$123,819 (114% increase from 2021)	\$4,500
Punta Gorda	279 returns (15% increase from 2021)	17% increase	\$72,834 (130% increase from 2021)	\$2,350

**Economic impact includes taxpayer savings, total refunds and financial equivalent of volunteer hours.*

THE STORIES BEHIND THE DOLLARS

A Little Kindness and A Little Savings Equals A Lot of Gratitude

"When we both worked, we always made sure to donate to United Way. In our retirement years, however, we streamlined our finances to live on a fixed income. When we received a small inheritance, we knew we had to file taxes but did not have it in our budget to go to a tax preparer.

"Fortunately, a program specialist at Charlotte County Human Services told us about the VITA program and we made our appointment. Our tax preparer, Jenny, walked us through our tax return and helped us discover that we did not owe any taxes! This was a miracle for us.

"At the VITA site in Punta Gorda we were treated with kindness and respect. We were made to feel like family and not a charitable handout. Thank God for United Way helping others."

Every Dollar Counts for Family of 7

A mother arrived at her VITA appointment pushing a young child in a stroller. Once she shared that she was raising 6 children, it was clear why she could not afford the cost of traditional tax preparation.

This mother was able to have her taxes prepared at no cost, and through utilizing child tax credits, she learned that she would be receiving a refund of over \$22,000. Her gratitude brought tears to the eyes of several VITA volunteers, knowing they had made a difference in her life and that of her family.

Answered Prayers

A young couple with a toddler came in for the first time to have their 2021 taxes prepared through VITA. She is a local schoolteacher, and he is in the process of transferring his medical license, to the tune of \$6,400 in licensing expenses. They shared that they had been praying over this \$6,400 financial need and were amazed to find that their anticipated tax refund was \$6,500.

They were thrilled and stated that this was truly an answer to prayer. They prayed a prayer of thanksgiving with their volunteer tax preparer, thanking God for his blessings. They were so grateful for the VITA program, for the church where they had their taxes prepared, and for God's answer to prayer. This tax return blessed not only this young family but also the volunteer who shared this experience with them.