



TANF and EITC: Creating Additional Opportunities for ARRA Funded Subsidized Employment Participants

January 26, 2011

Christine Bertin

Stakeholder Partnerships, Education and Communication (SPEC)

Internal Revenue Service

irs.gov

What is SPEC?

- Education and Outreach Function

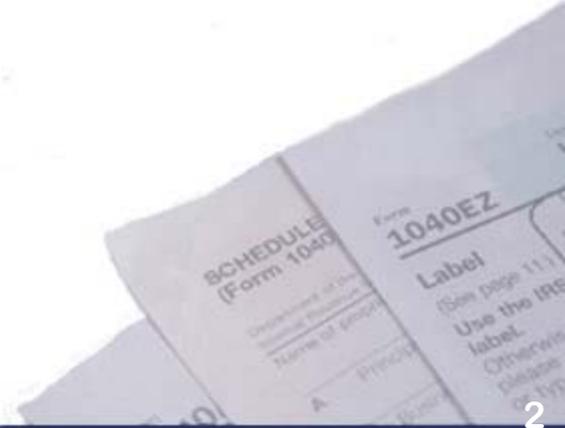
- Individual Tax Returns
- Free-File Alliance
- Tax Assistance Centers

-Administers Free Tax Programs

- Volunteer Income Tax Assistance Program (VITA)
- Tax Care For The Elderly (TCE)

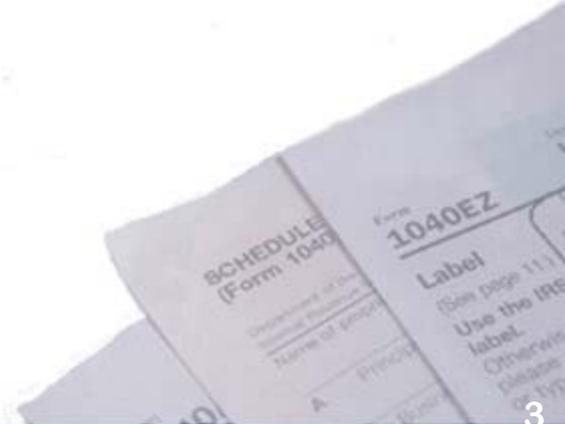
-Administers Grant Programs

- VITA
- TCE

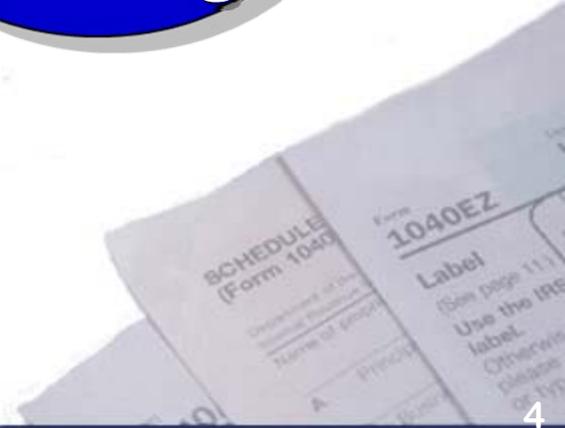


Who does SPEC serve?

- Low income taxpayers
- Persons with disabilities
- Limited English speaking persons
- Elderly taxpayers
- Rural Communities
- Native American Communities



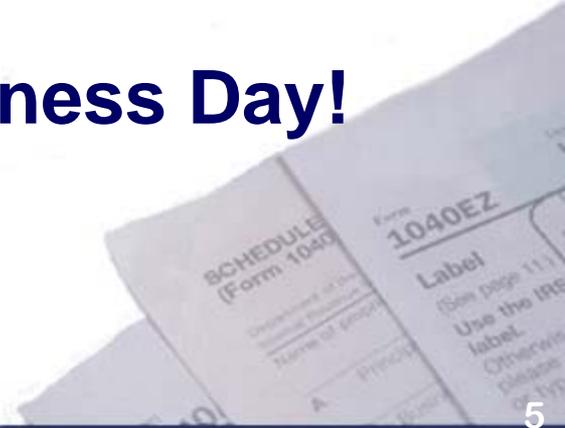
Community Partnerships



What is Earned Income Tax Credit (EITC)?

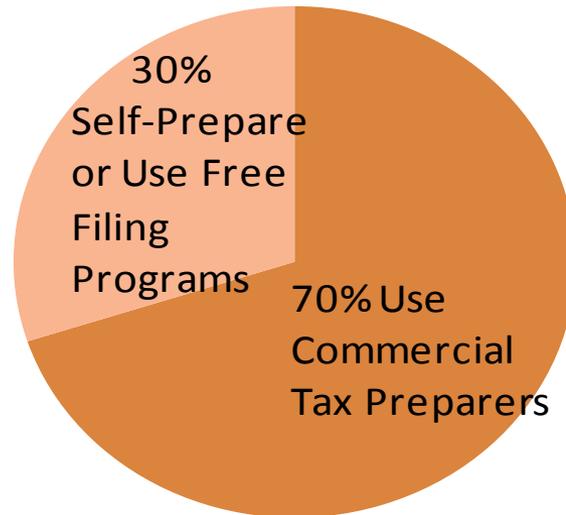
A federal tax benefit to help low and moderate income workers increase their financial stability.

- Reduces taxes for workers
- Supplements wages
- Encourages individuals to work
- Fully refundable credit
- January 28, 2011 is EITC Awareness Day!**



The High Cost of Commercial Tax Preparation

- When it's time to file a tax return, many workers seek help from a commercial tax preparer.
- Average fees range from \$85 - \$120 for e-filing.



EITC Claimants



IRS Outreach Support

- Free Tax Brochures, Products, Forms, Publications
- Marketing Tools on Outreach Corner
 - Drop-In Articles
 - Tax Podcasts
 - PSAs
 - Tips on Tax Issues
- EITC Central
 - EITC Statistics
 - Ready Made Marketing Tools
 - Customizable Marketing Tools
- EITC Nationwide Outreach Day



IRS Outreach Resources

Outreach Corner - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail W

Address <http://www.irs.gov/individuals/article/0,,id=219166,00.html> Go Links

Home | Change Text Size | Contact IRS | About IRS | Site Map | Español | Help

IRS.gov

Advanced Search Search Tips

Individuals | **Businesses** | Charities & Non-Profits | Government Entities | Tax Professionals | Retirement Plans Community | Tax Exempt Bond Community

Employees | Farmers | International Taxpayers | Military | Parents | Self-Employed | Seniors & Retirees | Students

Outreach Corner

Find it easy to spread the word about key income tax topics!

This page offers you electronic communication materials to use in reaching out to the people you serve.

Please feel free to use these items for your websites, in electronic products, publications, etc. as needed. More items will be added each month. We hope you find the information useful. Please send any feedback to us at partner@irs.gov.

Individuals Topics

- Abusive Tax Shelters
- Appeal a Tax Dispute
- Taxpayer Rights
- Online Payment Agreement
- Paying a Balance Due
- More Topics ...

IRS Resources

- Compliance & Enforcement
- Contact My Local Office
- e-file
- Forms and Publications
- Newsroom
- Frequently Asked Questions
- Taxpayer Advocate Service
- Where To File

July 2010

Drop-in Articles - Perfect for partner products and publications

- For Use by Partners in Communicating with Taxpayers
 - Tax tips for recently married taxpayers
 - Tax benefits for job seekers
 - Summer tax tips for students
 - ARRA tax benefits for students
 - What happens if I lose my job?
 - Let IRS break down communication barriers - Get tax help in your language
 - How do I file a tax return if I don't have a Social Security Number? (Spanish version below)
 - ¿Cómo puedo presentar una declaración de impuestos si no tengo un número de seguro social? (SP)
- For Use by Partners in Communicating with Affiliate Organizations
 - IRS seeks Certifying Acceptance Agents
 - What happens if someone loses their job?
 - IRS steps up financial education and asset-building opportunities
 - IRS Nationwide Tax Forums - Sign up now and get a discount!
 - Be sure you use E-file until October 15 (Multi-media release)

Local intranet

http://www.irs.gov/pub/irs-utl/oc_-_june_-_taxforum_affil_052710.pdf

IRS Outreach Resources

Outreach Corner - Microsoft Internet Explorer

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For Use by Partners in Communicating with Animate Organizations

- o [IRS seeks Certifying Acceptance Agents](#)
- o [What happens if someone loses their job?](#)
- o [IRS steps up financial education and asset-building opportunities](#)
- o [IRS Nationwide Tax Forums - Sign up now and get a discount!](#)
- o [People can use Free File until October 15](#) (Multi-media release)

Audio/Video

- [2010 Tax Podcasts](#) - Download IRS audio files, in English and Spanish, to use for podcasts.
- [2010 Tax Tips Videos](#) - a variety of resources and multimedia files to help you share the latest tax news with your taxpayer audiences. Videos are hosted on the YouTube channel and are available in English, Spanish, ASL with captions and voice-over.
 - o [English](#)
 - o [Spanish](#)
 - o [American Sign Language \(ASL\)](#)
- [2010 Radio Public Service Announcements](#) - These PSAs can be played during calendar year 2010. The files are in MP3 format and are downloadable in English and Spanish. There are :30, :60 and donut spots to use as a plug-in for local sponsors. Text versions of the recorded scripts are also downloadable.
- [Haven't filed a tax return in years?](#) Link to this 1-minute IRS video on You Tube from your Web site to let people know about filing for any unclaimed tax refunds.

Flyers/Brochures

- [Publication 4705, Brochure with information about Mortgage Debt Forgiveness \(English\)](#)
- [Publication 4705 SP, Brochure with information about Mortgage Debt Forgiveness \(Spanish\)](#)
- [Publication 4742, Let's Talk - Haven't Filed a Tax Return in a while?](#) - (Tri-fold brochure in English and Spanish that explains what people can do if they haven't filed a tax return in a while.)
- [Publication 4750, Let's Talk](#) - (Poster in English and Spanish for use by organizations that sponsor free tax assistance sites.)

Other Resources

- [IRS Newsroom](#)
- [IRS opens dedicated phone line for Gulf oil spill victims](#)
- [IRS provides tax help, guidance to Gulf oil spill victims; special assistance day planned for July 17](#)
- [Gulf oil spill: Questions & Answers](#)
- [Subscribe to IRS Tax Tips](#)
- [Partner and Volunteer Resource Center](#)

<http://www.irs.gov/newsroom/article/0,,id=154820,00.html> Local Intranet

IRS Outreach Resources



Life's a little easier with  earned income tax credit

**Be Prepared to Get the
Earned Income Tax Credit
You Earned**

1-800-828-1040 | www.irs.gov/eflc | ASK YOUR TAX PREPARER

Form 1040EZ (2014) Instructions for filers

If you plan to use a preparer to help you file a return and claim the EITC, you should bring certain documents to prove your income, deductions/credits, dependents, etc. These documents include:

- Valid driver's license or photo identification (self & spouse, if applicable)
- Social Security cards for all persons listed on the return
- Dates of birth for all persons listed on the return
- All income statements: Forms W-2 and 1099, Social Security, Unemployment, or other benefits statements, records of income and expenses from a business you own and any documents showing taxes withheld
- Dependent child care information: payee's name, address and SSN or tax ID number
- Proof of account at financial institution for direct debit or deposit (i.e. cancelled/ voided check or bank statement)
- Prior year tax return (if available)
- Any other pertinent documents or papers

Your Return Preparer, whether paid or volunteer, is required to ask you multiple questions to determine your correct income, expenses, deductions, and credits. Your Return Preparer has your best interests in mind and wants to help you avoid penalties, interest, or additional taxes that could result from later IRS contacts.

You are responsible for what is on your tax return. Being ready, with the right documents to prepare your return, will save you time and reduce the chance of mistakes.

Earned Income Tax Credit



EITC Central—www.eitc.irs.gov

Life's a little easier with



EITC CENTRAL

TAX PREPARER TOOLKIT

PARTNER TOOLKIT

MARKETING EXPRESS

Welcome

About EITC

What's Hot

Preview of Tax Year 2009

Child Related Tax Benefits Comparison

EITC Statistics

EITC Information for Press

News Releases and PSAs

Feedback Page

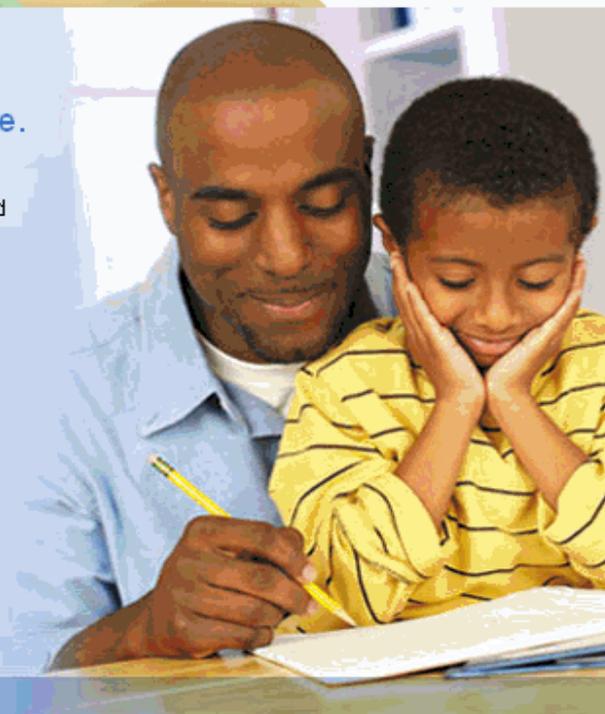
Search

Welcome to EITC Central: Everything you need, all in one place.

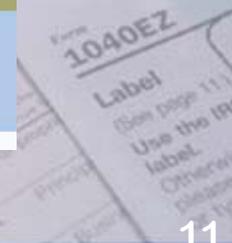
We created this new and improved site for our valued IRS partners and tax preparers. By using the latest tools for marketing, education and tools to help in accurate tax return preparation, you can ensure all EITC eligible workers receive the credit they earned and deserve.

IRS's goals for EITC are to increase participation while reducing error. The resources in this kit help balance the goals, assisting you in reaching those eligible workers who qualify for the credit and preparing accurate returns which reduces claims made in error.

We welcome [comments and suggestions](#) to better meet your needs in improving this site.



We thank you for your efforts in serving taxpayers well.



IRS Outreach Resources

Life's a little easier with  **eitc**
earned income tax credit

[EITC CENTRAL](#)

[TAX PREPARER TOOLKIT](#)

[PARTNER TOOLKIT](#)

[MARKETING EXPRESS](#)

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EITC Statistics

EITC State Statistics at-a-Glance for Tax Year 2008

State-by-State EITC Statistics for Tax Year 2008 through September 30, 2009

State	Abbr.	Number of Net EITC Recipients	Average Net EITC Amount	Total Net EITC Amount
Alaska	AK	36,290	\$1,630.92	\$59,186,002.00
Alabama	AL	507,475	\$2,384.89	\$1,210,273,261.00
Arkansas	AR	292,310	\$2,194.25	\$641,400,388.00
Arizona	AZ	460,585	\$2,082.36	\$959,104,067.00
California	CA	2,540,178	\$2,038.81	\$5,178,940,121.00
Colorado	CO	290,647	\$1,851.90	\$538,249,075.00
Connecticut	CT	182,560	\$1,828.21	\$333,758,825.00
Washington DC	DC	46,726	\$1,886.89	\$88,166,973.00
Delaware	DE	63,578	\$1,956.60	\$124,396,952.00
Florida	FL	1,758,927	\$2,094.81	\$3,684,613,416.00
Georgia	GA	876,378	\$2,222.22	\$1,948,442,873.00



Resources to Order Products



EITC is for people who earn less than \$48,279. If you qualify, it could be worth as much as \$5,657 this year, depending on your filing status and the number of qualifying children. So you could pay less federal tax or even get a refund. *Just imagine what you could do with that.*

Q&A

800-TAX-FORM

IRS Relationship Managers-
partner@irs.gov

Order Forms and Publications-
irs.gov/formspubs/index.html

EITC Central-

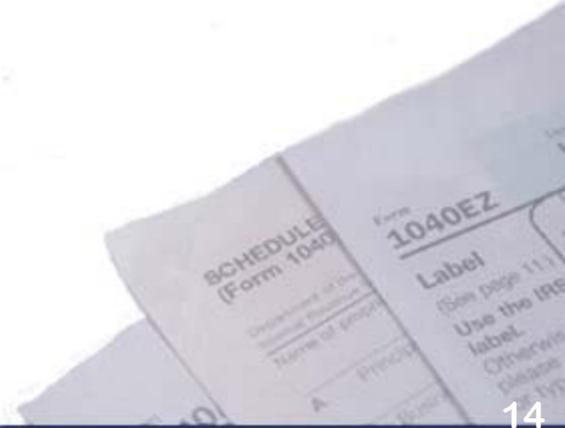
eitc.irs.gov/central/publications/



IRS Free Tax Prep Support

-VITA and TCE Programs

- Free TaxWise Software, desktop or online
- Software installation, set up, assistance
- Link' N Learn Taxes- online tax law training
- Site Coordinator Training online
- Classroom Training offered in many communities
- Free Tax Preparation Kit Resources
- 24/7 Help Line



IRS Free Tax Prep Support

- Approximately 400 IRS Taxpayer Assistance Centers nationwide
- More than 12,000 free income tax preparation sites nationwide

free file through IRS.gov for internet-enabled do-it-yourselfers

Free File Home - Your Link to Free Federal Online Filing

Free File has come to an end for this year. Check back with us on January 15, 2010.

Free File is the fast, easy, and free way to prepare and e-file your federal taxes online.

The Free File program provides free federal income tax preparation and electronic filing for eligible taxpayers through a partnership between the Internal Revenue Service (IRS) and the Free File Alliance LLC, a group of private sector tax software companies.

How do you want to do your 2008 federal taxes?

- **Traditional Free File** - I want tax software with step-by-step help
 - Free File supports preparation of Federal tax returns. However, many companies also offer state tax preparation though fees may apply.
 - Free tax preparation and e-filing if your adjusted gross income is \$56,000 or less in 2008.
 - Asks simple questions, puts your answers on the right forms.
 - Covers the most commonly filed Federal tax forms and schedules.
 - Includes Federal *online* - get your refund in as little as 10 days with Direct Deposit.
 - Does all the math for you.
 - Receive a quick confirmation within 48 hours that your return was received by the IRS.
 - Benefit from Free File's checks for accuracy.
 - Available in Spanish.
- **Free File Fillable Forms** - I want to fill in the tax forms and file them online without tax software.

IRS Free Tax Prep Resources

-VITA Site Locations

800-906-9887 or

www.irs.gov

-AARP Site Locations

888-227-7669 or

www.irs.gov

-Locations Taxpayer Assistance Sites (TACS)

211 or 311 or

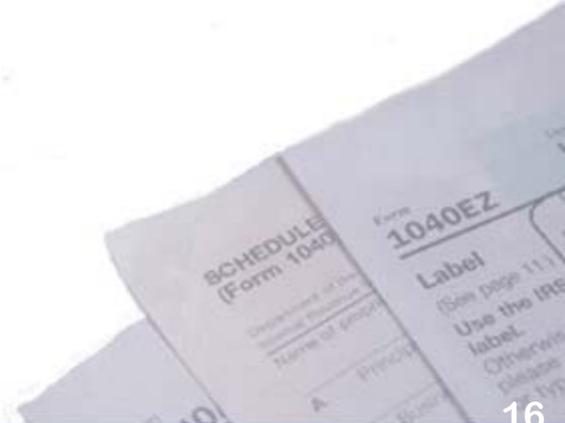
www.irs.gov

-TaxWise Help

800-411-6391

-free-file

www.irs.gov



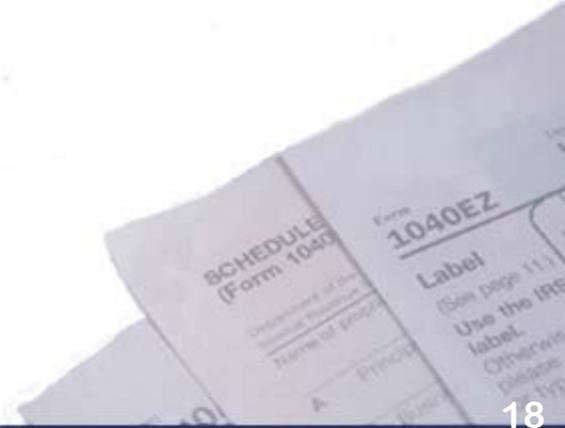
IRS Asset Building Support

- Tax Time Refund Opportunities
 - Direct Deposit
 - Split Refunds
 - Savings Bonds
 - Prepaid Cards
- Link existing community programs
- Conducted a Series of Webinars with Partners
- Provide Coalition Data for posting
- Understanding Taxes (UT)



New in 2011

- MoneyWise** Prepaid Card
- Savings Bonds- additional beneficiary
- ITIN Acceptance Agents
- Alternative Model for VITA Sites



Partner with IRS SPEC

The screenshot shows a Microsoft Internet Explorer browser window displaying the IRS website. The address bar shows the URL: <http://www.irs.gov/individuals/article/0,,id=119374,00.html>. The page title is "Become an IRS Partner to Help in Your Community".

The page features the IRS.gov logo and a navigation menu with categories: Individuals, Businesses, Charities & Non-Profits, Government Entities, Tax Professionals, Retirement Plans Community, and Tax Exempt Bond Community. Below this, there are links for Employees, Farmers, International Taxpayers, Military, Parents, Self-Employed, Seniors & Retirees, and Students.

The main content area is titled "Become an IRS Partner to Help in Your Community". It includes a search bar and a search button. The text reads: "Make a difference in your community by partnering with IRS and thousands of nationwide organizations to meet individual taxpayers' needs for tax education and assistance. In these tough economic times, tax benefits can offer stronger financial stability for people and the communities in which they live. They can also serve as the starting point in [realizing dreams](#)."

Under the heading "Our Approach", it states: "The Stakeholder Partnerships, Education and Communication (SPEC) office within the Wage & Investment Division has built a network of national and local partners. Organizations include corporate, faith-based, nonprofit, educational, financial and government. With so many tax benefits available today, taxes can serve as the starting point for a dream leading to stronger financial security for many people."

It further explains: "Partnering organizations prepare tax returns free for those whose incomes are below \$49,000. Also check out the partner [Outreach Corner](#) for links to newsletter articles, podcasts, widgets and other electronic products to help reach out to customers with timely tax news they may need."

A question is posed: "If you represent an organization that works with any of the following populations, why not look further to see how you can become involved?"

A table titled "Populations We Serve" lists the following groups:

Populations We Serve	
Low- to moderate-income population	People with disabilities
Older Americans	General population
Students	English as a second language
Military	Employees

At the bottom of the page, it says "Partner and Volunteer Resource Center".

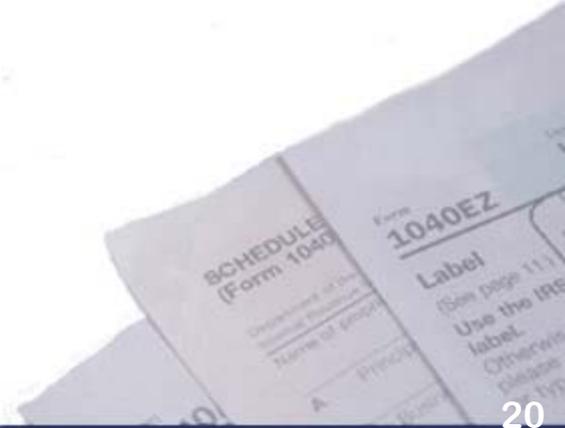
ACF-IRS Partnership Efforts

-Past ACF Partnerships

- Office of Community Services
- Office of Head Start
- Office of Child Support Enforcement
- Office of Family Assistance

-January 28, 2011

- EITC Awareness Day
- Memorandum of Understanding



Partner with IRS SPEC

SPEC Contacts

Partner@irs.gov

SPEC Territory Manager or
Relationship Manager

Rebecca.Harrell@irs.gov

Community Coalitions

National EITC Outreach
Partnership (CBPP)
www.cbpp.org/eitc-partnership/index.html

ACTS Asset Coalition
Toolkit for States
www.assetcoalitiontoolkit.org/



THANK YOU!

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