



KAYE SCHMITZ
PRESIDENT/CEO

“We’re all working with the same family...”

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- **Partnerships are essential**
- **Identify other departments and organizations that also serve your clients:**
 - **Food banks**
 - **United Ways**
 - **Community Action Agencies**
 - **County Extension Service Offices**
 - **Community government offices**
 - **Faith-based organizations**
 - **Other nonprofit agencies**

How do I help my clients find a free tax site?

- **If you don't know if taxes are being prepared for free in your area...**
 - **Contact your local IRS SPEC* office:**
 - **Find out if there is a local coalition preparing free tax returns**
 - **If so, introduce yourself to the coalition leader**
 - **Offer to host or attend a meeting**
 - **Offer to hand out tax site materials in your office**
 - **Offer to work with the coalition to set up a process for getting your clients to the tax sites**
 - **Set up day dedicated to your clients at tax sites**
 - **Join the coalition for future planning**

* Stakeholder, Partnerships, Education, and Communication

How do I help my clients find a free tax site?

- **If you know about or already belong to a free tax coalition...**
 - **Take your involvement up a notch:**
 - **Send letters to your TANF clients well before the tax season begins with locations of the tax sites**
 - **Send or hand out letters with “tickets” for free tax preparation**
 - **Make your staff available for tax training so they will know how to prepare clients for the free tax sites**
 - **Host a tax site so your clients have a one stop shop**
 - **Volunteer to draft a year round awareness plan that all coalition members can follow**

Once you're all working like a well-oiled machine...

- **Bring in the sophisticated stuff...**
 - **Advertise**
 - **Write joint grants for marketing dollars**
 - **Financial Institutions**
 - **IRS**
 - **Other government agencies**
 - **Private foundations**
 - **United Ways**
 - **Partner with local media outlets for pro bono advertising**

Once you're all working like a well-oiled machine...

- **Bring in the sophisticated stuff...**
 - **Direct Marketing – One example - posters installed in specific zip codes in areas where clients gather**



Once you're all working like a well-oiled machine...

- Bring in the sophisticated stuff...
 - Direct Marketing
 - Large framed poster...a little pricey, but extremely effective

“Did you make \$49,000 or less last year?”

Get your taxes done for FREE by RealSense this year.

Tell 'em WE sent you. 

CALL UNITED WAY 2-1-1 BY DIALING 2-1-1 OR 904-632-0600 FOR TAX SITE HOURS OF OPERATION AND INFORMATION ON OTHER FREE SERVICES, INCLUDING FINANCIAL EDUCATION CLASSES.

www.realsensejax.org

THE CLOSEST FREE TAX SITE TO YOU IN JACKSONVILLE, FL 32206 IS:

Jax Federal Credit Union 562 Park Street, 32204	Northeast Florida Community Action Agency (RFK Center) 1133 Ionia Street, 32206
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Helping your clients receive their EITC is a great first step...

...that sets the stage for long-term asset building since most coalitions also offer:

- Government savings bonds at tax time**
- Opportunities to open mainstream checking and/or savings accounts**
- Opportunities for free financial education**
- Opportunities for matched savings accounts**
- Opportunities to fill out FAFSA or Pell grants for college assistance**
- Referrals for other financial assistance**

Contact Information:

Kaye Schmitz

President/CEO

Florida Prosperity Partnership

kayedschmitz@bellsouth.net

904-940-0296

www.floridaprospertypartnership.org