

**Methodist Le Bonheur Community Outreach (MLCO) has received a three year federal grant to increase use of Earned Income Tax Credit (EITC) in Shelby County through use of United Way of the Mid-South’s (UWMS) Free Tax Preparation Program (FTP). This is a collaboration with MLCO, UWMS and Early Success Coalition (ESC), who are our grant sub-recipients. We are working together to advocate for free tax services rather than use of predatory tax preparation centers.**

**What is the EITC and the goal of TIP?**

The **EITC** is a federal tax credit designed to increase the take-home earnings for low and moderate income working people. This tool is one of the most effective ways to help lift families above the federal poverty line.

The goal of Tax Impact Project (TIP) is to increase awareness and engagement of EITC in minority households, especially within the Hispanic Community, in Shelby County to receive FREE Volunteer Income Tax Assistance (VITA) services through UWMS.

# United Way of the Mid-South Free Tax Prep Program/ VITA

UWMW’s Free Tax Prep program utilizes trained VITA (Volunteer Income Tax Assistance) volunteers to prepare and file income taxes for eligible clients. VITA improves the lives of individuals and families, while also boosting our local economy. When a family that is struggling to make ends meet uses the FTP Services it can make a huge difference to their budget. UWMS’s Free Tax Prep helps clients avoid predatory lending practices at less than reputable tax centers, and can provide information about savings, financial literacy, and healthy financial practices.

**Eligibility Guidelines**

* **Shelby County Residents Only**
* Photo I.D. required for you, and your spouse if married
* Social Security cards, and birth dates for you, spouse if married, and dependents
* W-2’s, 1099’s and other tax related income documentation
* Information for all deductions/credits
* Total paid to daycare and their tax I.D. number (if needed)
* Account information (bank account, routing number) for direct deposit
* If married filing jointly, both spouses must be present
* Maximum household income: based on number of children and total income **(see table below)**
* **Anyone can participate coworkers, clients, families as long as you qualify!!! It is open to everyone!**

**Earned Income and must be less than:**

**Married Filing Jointly** **Single**

3+ children $56,844 3+ children $50,954

2 children $53,330 2 children $47,440

1 child $47,646 1 child $41,756

NO child $21,710 NO child $15,820

# Referrals

When a client wants assistance with free tax preparation services, referrals can be made by Le Bonheur’s TIP Program, Early Success Coalition, and United Way of the Mid-South through the Driving the Dream portal to access UWMS’s Free Tax Prep Services.

Once the referral is completed, a trained VITA volunteer will contact the client and advice program details, locations for free tax prep, and any additional documentation that may be needed.

External Referrals who want to participate will use a paper/electronic referral form (which will be emailed to you).

**Once the referral form is filled out, you can send the referral form to the Outreach Coordinator’s TIP email (taxproject@lebonheur.org) or fax 901-287-4738.**

**Referral fill in questions:**

* Name of client (first, mid, and last name)
* Address
* Phone Number
* Email (if they have one)
* Preferred Language
* Gender
* Race/Ethnicity
* Name of the community organization
* Preferred Method of Communication (Phone Call, Text, or Email)

# United Way of the Mid-South’s Super Sites and Mobile Sites

UWMS will have 5 super sites that are located in high volume areas, such as Whitehaven, Frayser, and Hickory Hill. There will also be up to 20 stationary sites throughout the county, and mobile (temporary) sites as well. No appointment is needed at any location. (**Currently there is no Spanish translator available at any site**; **working on getting volunteer translators.**)

UWMS will comply with all COVID-19 Safety Protocols No contact drive-thru drop offs will be available at all sites.

Methodist Le Bonheur Community Outreach Building: 600 Jefferson Ave is a designated mobile site location and will have trained VITA personnel available on Wednesdays and Fridays, 10am2pm, through the tax season.

Clients can call 2\*1\*1 or 1-888-709-0630 for site operating hours (**Currently there is no Spanish translator available at this time**)

Website Link: [**https://www.uwmidsouth.org/free-tax-prep/**](https://www.uwmidsouth.org/free-tax-prep/)

# Program Evaluation

MLCO’s Program Evaluation team will be conducting 100 random client telephone surveys that will include an incentive for participation.

# Frequently Asked Questions

1. Is the EITC available to someone who is married but files separately?Tax filers filing married, but separate returns are not eligible for the EITC.
2. What if a client has not filed taxes for a few years. Do your Free Tax Prep preparers assist with prior year taxes?Our preparers are able to assist with 2016 - 2020 returns, when the time permits. Years prior to 2016 will be prepared during the extended filing season, mid-May through the end of June.
3. Is there any provision for assistance if a client is audited?No
4. If a client comes in and they do not have a W2 because they are getting paid in cash (for example: house cleaning services) and they want to get their taxes done. Can UWMS Free Tax Prep program still assist them with their taxes? Yes with their records of how much they made and their expenses.