

# 2014

## End of Season Report



Forsyth Free Tax

Experiment in Self Reliance

7/15/2014

Since 1999, Experiment in Self Reliance has been assisting Forsyth County residents with tax return preparation. Over the years, this service has helped thousands of residents save millions in exorbitant fees associated with filing, as well as educating and linking them to other asset building options.

This year was no different. With the help of 116 staff and volunteers, ESR's Forsyth Free Tax program helped 2,896 families to file tax returns. The impact of this service is far reaching. Not only does the taxpayer save on average \$200 in tax preparation fees, but they are educated on their personal tax situation, which not only empowers them but their children as well.

We saw an increase of clients utilizing our Facilitated Self Assistance option. Facilitated Self Assistance (FSA) is a program that allows taxpayers to file their own tax return with help from a volunteer either in person, online or over the phone, if needed. This is part of the Free File Alliance with the IRS. Tax Preparation software providers have linked up with the IRS to provide free tax return preparation to low to moderate income individuals and families. The option we chose to utilize is My Free Taxes. The My Free Taxes Partnership is sponsored by Walmart and is in partnership with United Way, Goodwill and the National Disability Institute. The software used is H&R Block at Home, complete with H&R Block's Audit Shield benefit. This benefit guarantees that if the taxpayer is audited, H&R Block will assist them with the process. 423 clients used this service this year, compared to 240 clients last tax season. Data from these returns is limited, and refund and EITC amounts were not available in time for this report.

This year, we operated 11 traditional VITA sites. The site at Truliant Federal Credit Union closed last year. The site at Rural Hall Library reopened this year as an appointment only site. The remaining sites did not change.

While reviewing the results presented in this document, you will notice that there is a slight decrease in the number of returns prepared at individual sites over last year. This is mainly due to the loss of four preparation days in the height of the tax season because of weather.

Many thanks to everyone who helped make this a successful year! Thanks to each VITA site for welcoming and assisting us with crowd control, sign in, technical assistance, smiles, supplies, and so much more.

Thanks, especially, to the volunteers who worked diligently with us assisting clients with tax preparation, tax advice, answering questions, and selflessly giving of themselves for the good of the community. Thanks to administrators and professors from Forsyth Technical Community College, Wake Forest University, Salem College and Winston-Salem State University for their help in recruiting and training the wonderful student volunteers.

The information contained within this report covers the 2013 tax season beginning January 30, 2014 through April 15, 2014.

## VITA Sites

Site Locations	Days and Times
<b>Prosperity Center South</b> 508 Waughtown Street <b>Opened February 3, 2014</b>	Mondays, 9am-12pm Wednesdays, 4pm-8pm Fridays, 11am-3pm Saturdays, 9am-1pm
<b>Prosperity Center North (Mobile Unit and Appointment Site)</b> 1253 Liberty Street	Tuesday, 10am-2pm Wednesday, 10am-2pm Thursday, 10am-
<b>Goodwill Industries</b> 2760 Peters Creek Parkway <b>Opened February 4, 2014</b>	Tuesdays, 4pm-7:30pm Thursday, 4pm-7:30pm
<b>Goodwill Industries-University</b> 2701 University Parkway <b>Opened February 5, 2014</b>	Wednesdays, 4pm-8pm Thursdays, 4pm-8pm
<b>Winston-Salem Transit Authority</b> 100 West Fifth Street <b>Opened February 3, 2014</b>	Mondays, 4pm-8pm Tuesdays, 4pm-8pm Fridays, 1pm-5pm
<b>Central Library</b> 660 West Fifth Street <b>Opened February 1, 2013</b>	Saturdays, 9am-1pm
<b>Malloy-Jordan Heritage Center</b> 1110 East Seventh Street <b>Opened February 1, 2013</b>	Saturdays, 10am-2pm
<b>Experiment In Self-Reliance</b>	Appointment Only
<b>Family Services Head Start</b>	Appointment Only
<b>Rural Hall Library</b>	Appointment Only

## Summary

Category	Count	Total
Filing Status*		
Single	1462	
Married-Filing Jointly	304	
Married-Filing Separately	82	
Head of Household	428	
Qualifying Widow(er)	0	
E-files		2896
Total Refunds*		\$3,053,350
Federal Earned Income Tax Credit (EITC)*	890	\$1,388,265
Child Tax Credit*	890	\$122,456
Education Credit*	185	\$244,355
Elderly Credit*	2	\$2,121

\*Does not include data from 423 My Free Taxes returns. Data was not available at the time of this report.

## Federal Refund by Location\*

VITA Sites	# of E-Files	Total Refund
Prosperity Center North	167	\$13,353
Prosperity Center South	430	\$679,483
Central Library	281	\$339,751
Experiment in Self-Reliance	252	\$278,242
Goodwill ROC	347	\$373,533
Goodwill University	403	\$429,402
Head Start	54	\$56,677
Malloy-Jordan	161	\$210,838
Forsyth Rural Hall Library	101	\$122,400
Industries for the Blind	68	\$53,369
Winston-Salem Transit Authority	218	\$296,423

*\*There were approximately 423 self-prepared returns. Statistics for these returns are not reflected in this report.*

## Earned Income Tax Credit by Location

VITA Sites	# of EITC	Average EITC	Total EITC
Prosperity Center North	61	\$1557	\$94,977
Prosperity Center South	157	\$1967	\$308,808
Central Library	130	\$1588	\$206,449
Experiment in Self-Reliance	59	\$2255	\$133,045
Goodwill ROC	107	\$1312	\$140,343
Goodwill University	130	\$1268	\$164,818
Head Start	27	\$1866	\$50,930
Malloy-Jordan	62	\$1507	\$93,451
Forsyth Rural Hall Library	26	\$1561	\$40,576
Industries for the Blind	21	\$559	\$11,738
Winston-Salem Transit Authority	110	\$1301	\$143,130

*\*There were approximately 423 self-prepared returns. Statistics for these returns are not reflected in this report.*

## Child Tax Credit (CTC) by Location

VITA Sites	# Claimed	Total CTC
Prosperity Center North	61	\$10,778
Prosperity Center South	157	\$41,541
Central Library	130	\$14,135
Experiment in Self-Reliance	59	\$17,314
Goodwill ROC	107	\$6,377
Goodwill University	130	\$11,122
Head Start	27	\$0
Malloy-Jordan	62	\$7676
Forsyth Rural Hall Library	26	\$3995
Industries for the Blind	21	\$348
Winston-Salem Transit Authority	110	\$9170

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## Education Credit by Location

VITA Sites	# Claimed	Total Credits
Prosperity Center North	12	\$18,428
Prosperity Center South	36	\$38,265
Central Library	48	\$64,386
Experiment in Self-Reliance	16	\$30,968
Goodwill ROC	20	\$19,947
Goodwill University	16	\$18,644
Head Start	10	\$20,544
Malloy-Jordan	14	\$22,877
Forsyth Rural Hall Library	4	\$2,888
Industries for the Blind	1	\$320
Winston-Salem Transit Authority	8	\$7,658

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