



# UNITED WAY AND MYFREETAXES

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Tax credits and refunds are a pathway to financial stability. **MyFreeTaxes is an indispensable resource for accessing these valuable tax credits.** In fact, for many households, the tax refund may be the most substantial check they receive each year.

MyFreeTaxes offers free assistance filing federal and state taxes. United Way – the largest community-based nonprofit in the world, impacting 48 million people across 95% of the U.S. and 37 countries – provides MyFreeTaxes in partnership with the IRS's Volunteer Income Tax Assistance (VITA) program to help filers prepare their tax returns on their own or have their return prepared for them.

Since 2009, MyFreeTaxes has helped low-to-moderate income filers complete **1.3 million** federal returns. This has resulted in savings of **\$260 million** in filing fees and **\$2 billion** in refunds. Annually, more than **500,000** tax filers are guided by MyFreeTaxes to access and leverage VITA free tax filing services.

**In 2023 alone, MyFreeTaxes facilitated the preparation of approximately 45,000 federal returns and 37,000 state returns for Facilitated Self Assistance (FSA) Remote VITA filers.** This accomplishment underscores the program's commitment to reaching and assisting individuals in various tax situations.

By seamlessly guiding users through the complexities of federal and state tax filings, MyFreeTaxes not only saves users significant costs, but also provides crucial assistance along the way. By creating a "no-wrong-door" user experience, MyFreeTaxes empowers all low-to-moderate income filers to choose the VITA service style that best suits their needs.

- **85 percent** of filers completing the intake process opt for MyFreeTaxes FSA Remote VITA, where access to the TaxSlayer FSA software is complemented by the support of a dedicated team of IRS-certified MyFreeTaxes support specialists.
- The remaining **15 percent** are efficiently referred to Traditional and Virtual VITA services through established channels such as the IRS VITA Site Locator tool or 211, which connects people to locally available resources 24/7 in 99% of the U.S.

**MyFreeTaxes offers support for different needs.** People can access year-round support from IRS VITA-certified specialists via the toll-free MyFreeTaxes Helpline, email, and live chat. And MyFreeTaxes guides for gig workers, small businesses and child care centers offer even more detailed guidance. This multifaceted support system helps people get timely, relevant assistance – and helps foster financial well-being.



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# IRS VOLUNTEER INCOME TAX ASSISTANCE PROGRAM (VITA)

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## HISTORY

The **Internal Revenue Service (IRS)** established the **Volunteer Income Tax Assistance (VITA)** and **Tax Counseling for the Elderly (TCE)** programs in 1969 to provide vulnerable Americans with a free, reliable mechanism to file their taxes. For much of its early history, VITA was managed by local IRS Taxpayer Education personnel, who would recruit and train volunteer tax preparers and assign them to sites in the community such as libraries and community centers.

In 2000, the IRS created the Stakeholder Partnerships, Education and Communication, or SPEC, department which led to a new vision of the IRS role in VITA. The emphasis shifted to developing and supporting community partnerships rather than direct service provision. SPEC began cultivating partnerships with community-based organizations to secure VITA sites, recruit and train volunteers, and manage site operations.

## CURRENT OPERATIONS

Though now run almost exclusively by nonprofit organizations, the VITA program continues to provide free tax help to people who need assistance in preparing their own tax returns, including:

- People who generally make \$60,000 or less
- Persons with disabilities; and
- Limited English-speaking taxpayers

VITA and TCE sites are generally located at community and neighborhood centers, libraries, schools, shopping malls and other convenient locations across the country. The IRS maintains a locator tool to help filers find a VITA site in their community. The VITA Locator Tool can be found at [Get Free Tax Prep Help \(treasury.gov\)](https://www.irs.gov/charities-non-profits/vita-locator).

VITA sites are staffed by volunteers, all of whom must complete tax preparation training that meets or exceeds IRS standards. This training includes maintaining the privacy and confidentiality of all taxpayer information. In addition to requiring volunteers to certify their knowledge of the tax laws, the IRS requires a quality review check for every return prepared at a VITA/TCE site prior to filing.

The VITA and TCE programs typically prepare 3.5 million returns annually, with an accuracy rate higher than 90 percent.



## UNITED WAY AND VITA

By 2003, it was clear that United Way's hyper-local role – generating resources and bringing people and organizations together in the community – uniquely positioned the United Way network to strengthen VITA. In 2004, the IRS identified 105 local United Ways actively participating in local VITA programs. By 2023, that number had grown to almost 300, representing 45 states and Puerto Rico and including 100 United Ways with IRS VITA grants to support community work. This makes United Way the largest national network offering free tax preparation services in the U.S.

**With United Way's help, more than 3,200 VITA sites prepared almost 1 million tax returns last year -- generating \$1.8 billion in refunds to low- and moderate-income households in local communities across America.**