



Extension Colleagues,

Are you looking for a program with measureable impacts that can really make a difference for low and moderate income families? Would you like to report that your Extension programming helped dozens of families in your area save hundreds of dollars on tax preparation costs and receive thousands of dollars in tax refunds? Dollars that can help strengthen local economies. For example, Extension in one Utah County reported assisting 106 families who saved \$12,190 in tax preparation fees and received \$169,600 in refunds.

If so, please consider making taxpayer education a part of your Extension programming. As Extension colleagues, we have each had rewarding and successful experiences working with the Earned Income Tax Credit (EITC) and Volunteer Income Tax Assistance (VITA) programs supported by the Internal Revenue Service. The IRS is anxious to partner with Extension throughout the nation to help even more taxpayers benefit from these programs.

Our involvement varies from increasing awareness, to educational efforts, to actually certifying as VITA volunteers. For example, Joanne Bankston from Kentucky State University focuses on making her clientele aware of the EITC. Unfortunately, approximately 25% of eligible families nationwide do not file for this credit and leave literally billions of dollars unclaimed. More efforts like Joanne's are needed to insure these funds are used by these deserving families.

As part of her Extension work at Purdue University, Vickie Hadley provides financial education programming to VITA locations. She recognizes the "teachable moment" that exists when families are about to receive a refund that may equal as much as 30% of their annual income.

In Utah and New Hampshire, Extension Agents and Specialists have joined local VITA coalitions. In this capacity they help direct VITA activities, in partnership with representatives from other agencies for outreach and to conduct financial management education as well as joining coalitions to become a statewide alliance. University of Missouri Extension, University of New Hampshire and Utah State University provide VITA services to rural areas and employers. One area of emphasis is to prevent taxpayers from taking on costly refund anticipation loans and the opportunity to share financial management education.

If you would like to know more please contact one of us or Robin Taylor, the Internal Revenue Service liaison with Extension at Robin.Taylor@irs.gov. Robin would be happy to help you get involved.

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