

# VITA

*VOLUNTEER INCOME TAX ASSISTANCE*

**VITA-WFIS-EITC:  
Community Partner Information  
Presentation**

November 2021





# About Cross Community & The Equity Center

Our mission is to advance equity & justice, empower generosity, and improve the quality of life in Gaithersburg, Germantown, and Montgomery Village - the GMV.

Our vision is for individual, community, and generational empowerment.





# Background on the Earned Income Tax Credit (EITC) and the Working Families Income Supplement (WFIS)

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- ✓ **Federal EITC started in 1975**
  - For low and moderate income earners – AGI below \$56,844 (2020)
  - Average Federal EITC benefit - \$3,191 (2017)
  - Widely considered the most effective poverty reduction tool in American history
- ✓ **Maryland State EITC started in 1987**
  - One of 29 states with own EITC (follows Federal income guidelines)
  - 50 percent of the Federal EITC
- ✓ **Montgomery County WFIS started in 2000**
  - Matches the state refundable EITC dollar for dollar
  - One of three counties in the nation that offers this third level of EITC



# Three Significant Developments in 2021:

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- ✓ Maryland's Expansion of the EITC (SB 218 – March 2021)
  - For first time ever, allows ITIN (non-citizen) filers to qualify for the EITC
- ✓ Montgomery County's Expansion of the WFIS (EB 14-21 – June 2021)
  - For first time ever, allows ITIN (non-citizen) filers to qualify for the WFIS
  - \$45 million funded for tax years 2020-2022
- ✓ Federal Child Tax Credit (CTC) – Also available to non-citizens

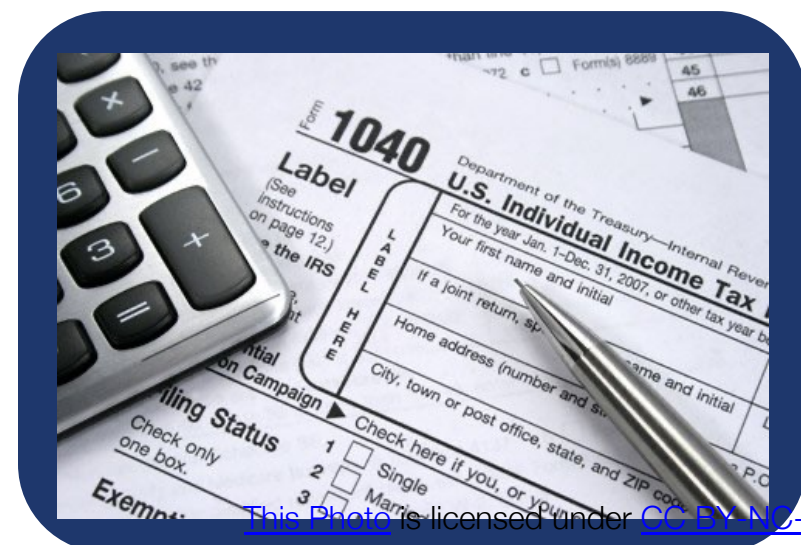
Unprecedented opportunity to assist low-income, immigrant earners



# About the CASH Campaign of MD



The *CASH Campaign of Maryland* is a non-profit organization that promotes economic advancement for low-to-moderate income individuals and families in Baltimore and across Maryland. CASH is an acronym that stands for *Creating Assets, Savings, and Hope*. CASH accomplishes its mission through operating direct service programs, building organizational and field capacity, and leading policy and advocacy initiatives to strengthen family economic stability.



Free Tax Preparation



Financial Capability



Policy &  
Advocacy



Practitioner  
Training

*Creating Assets, Savings and Hope*



# Three-Pronged Effort

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## ➤ **Access credits**

- State EITC, WFIS, and CTC

## ➤ **Empower through financial education**

- Cohorts and Classes with Financial Education partners

## ➤ **Refer to financial products, resources, and tools**

- Build savings and credit
- Banking and loan products



# Three-Part Impact Strategy

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## ➤ Inform

- Goal: Reach and inform > 1000 people

## ➤ Include

- Goal: Move > 500 people to begin process of inclusion into the social system and network

## ➤ Increase

- Goal: Access and Invest into the local economy > \$2.5Mil in 2022 alone
  - Mont Co. OMB estimates that 21,000 could benefit from these changes



# It Takes a (GMV) Village

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We Need  
Your Help!



# 1) Recruit Volunteers

- Especially Spanish language needed
- Various volunteer opportunities
- VITA certification requires 10 hours of training and pass certification exam
- Volunteer Sign Up:  
<https://forms.gle/fG6TR8BwF4FeQWmZ9>



MAKE A DIFFERENCE!

*Volunteer with VITA to provide FREE tax help to strengthen working families.*



**PEOPLE  
WIN**

- ✓ Tax returns prepared for FREE
- ✓ Accurate returns and timely refunds
- ✓ Access to financial stability resources including banking, food, and financial education



**COMMUNITY  
WINS**

- ✓ Tax dollars spent locally benefit Montgomery County businesses
- ✓ Tax refunds and financial education empower families
- ✓ Financially stable neighbors help local economy



**VOLUNTEER  
WINS**

- ✓ Give back to others
- ✓ Learn to prepare/understand taxes
- ✓ Build your resume and network
- ✓ Academic credit opportunity

**We are looking for:**

- English and/or Spanish speakers
- Enjoy numbers and helping others
- Students, retirees, community-minded

**To Sign Up:**



For More Info: Email at [VITA@cross-community.org](mailto:VITA@cross-community.org) or by calling 202-893-0996.  
(English and Spanish)





## 2) Promote to the GMV Community

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If your community primarily includes the GMV and is low-income and immigrant, you can send out these links for information and to sign up:

[English](#)

[Spanish](#)

### 3) Provide Funding and Resource Support

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- **Funding for staffing, supplies, and capacity building**
- **In-kind donations of laptops and computers**





**CROSS**  
**COMMUNITY**  
**THE**  
**EQUITY**  
**CENTER**

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