

Free Tax Prep

Free Tax Filing Services

- Why free tax prep?
- Choosing your UWKC tax site
- Important info & next steps



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At United Way, we're working side by side with communities to build an equitable future for everyone.

Why choose free tax prep?

Why choose United Way of King County?

Cost

- Professional tax prep fees in WA are highest in the country, on average
- Typically increase based on complexity & additional services

- Always free & provide other ways to save money like check cashing vouchers
- Volunteers are trained & IRS-certified at “Advanced” level to prepare complex returns

Missed Opportunity

- 1 out of 5 tax filers miss out on vital tax credits each year totaling \$100s or \$1,000s, sometimes by using informal tax preparers

- Each site led by team of on-staff managers
- Use of a multi-step process that ends with a quality review for each client
- Capacity to amend tax returns from past 3 years to claim missed tax credits and other benefits

Extra Services

- Typically run by community-based organizations that can connect you with other community resources
- Often tailored to community members typically served

- Onsite services related to tax prep like ITIN applications/renewals, SSN verification & language support
- Sign-up for Affordable Connectivity Program at certain sites
- Connect with other UWKC programs like food & rent assistance

Multiple Service Models

- In-person through IRS’s Volunteer Income Tax Assistance (VITA) & Tax Counseling for the Elderly (TCE) Programs
- Online self-file options like www.MyFreeTaxes.org

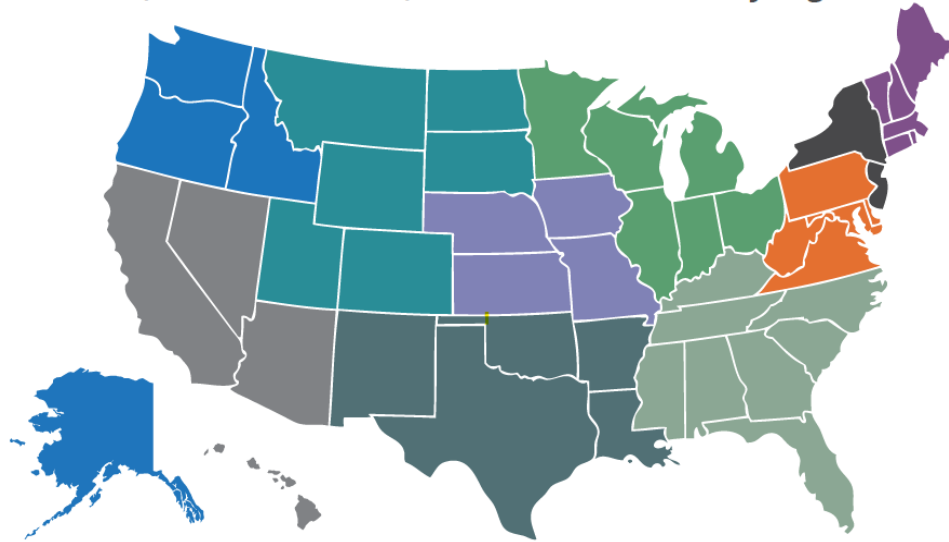
- 19 in-person sites & 1 virtual tax site
- Tiered income thresholds: \$80k single filers, \$96k non-single filers

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Why free tax prep & UWKC?

Appendix: 1040, 1040 + Schedule A, and 1040 + Schedule C by Region



REGION 1 CT, ME, MA, NH, RI, VT 1040.....\$244 1040 + Sch A.....\$286 1040 + Sch C.....\$411	REGION 2 NJ, NY 1040.....\$209 1040 + Sch A.....\$256 1040 + Sch C.....\$363	REGION 3 DE, DC, MD, PA, VA, WV 1040.....\$212 1040 + Sch A.....\$257 1040 + Sch C.....\$376	REGION 4 AL, FL, GA, KY, MS, NC, SC, TN 1040.....\$201 1040 + Sch A.....\$243 1040 + Sch C.....\$327	REGION 5 IL, IN, MI, MN, OH, WI 1040.....\$179 1040 + Sch A.....\$220 1040 + Sch C.....\$298
REGION 6 AR, LA, NM, OK, TX 1040.....\$229 1040 + Sch A.....\$274 1040 + Sch C.....\$373	REGION 7 IA, KS, MO, NE 1040.....\$178 1040 + Sch A.....\$216 1040 + Sch C.....\$294	REGION 8 CO, MT, ND, SD, UT, WY 1040.....\$231 1040 + Sch A.....\$276 1040 + Sch C.....\$365	REGION 9 AZ, CA, HI, NV 1040.....\$234 1040 + Sch A.....\$295 1040 + Sch C.....\$398	REGION 10 AK, ID, OR, WA 1040.....\$248 1040 + Sch A.....\$304 1040 + Sch C.....\$414

Source: <https://www.drakesoftware.com/content/drake-software-2022-how-do-your-tax-prep-fees-stack-up-infographic/>

	Professional Tax Preparer	Self-File Software / Website Example: TurboTax	United Way Free Tax Prep
Total refund:	\$1,500	\$1,500	\$1,500
Fee for basic 1040 tax return:	\$248	\$40 / \$0	\$0
Additional fee for schedule A: Itemized deductions	\$56	\$30 / \$39	\$0
Additional fee for schedule C: Profit & loss for gig work	\$110	\$50	\$0
Service fee:	\$0	\$39 Refund processing fee	\$0
Assistance for tax questions:	\$0	NA / \$80	\$0
Remaining refund:	\$1,086 (72%)	\$1,341 (89%) / \$1,292 (86%)	\$1,500

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Choosing your tax site

In-person or virtual?



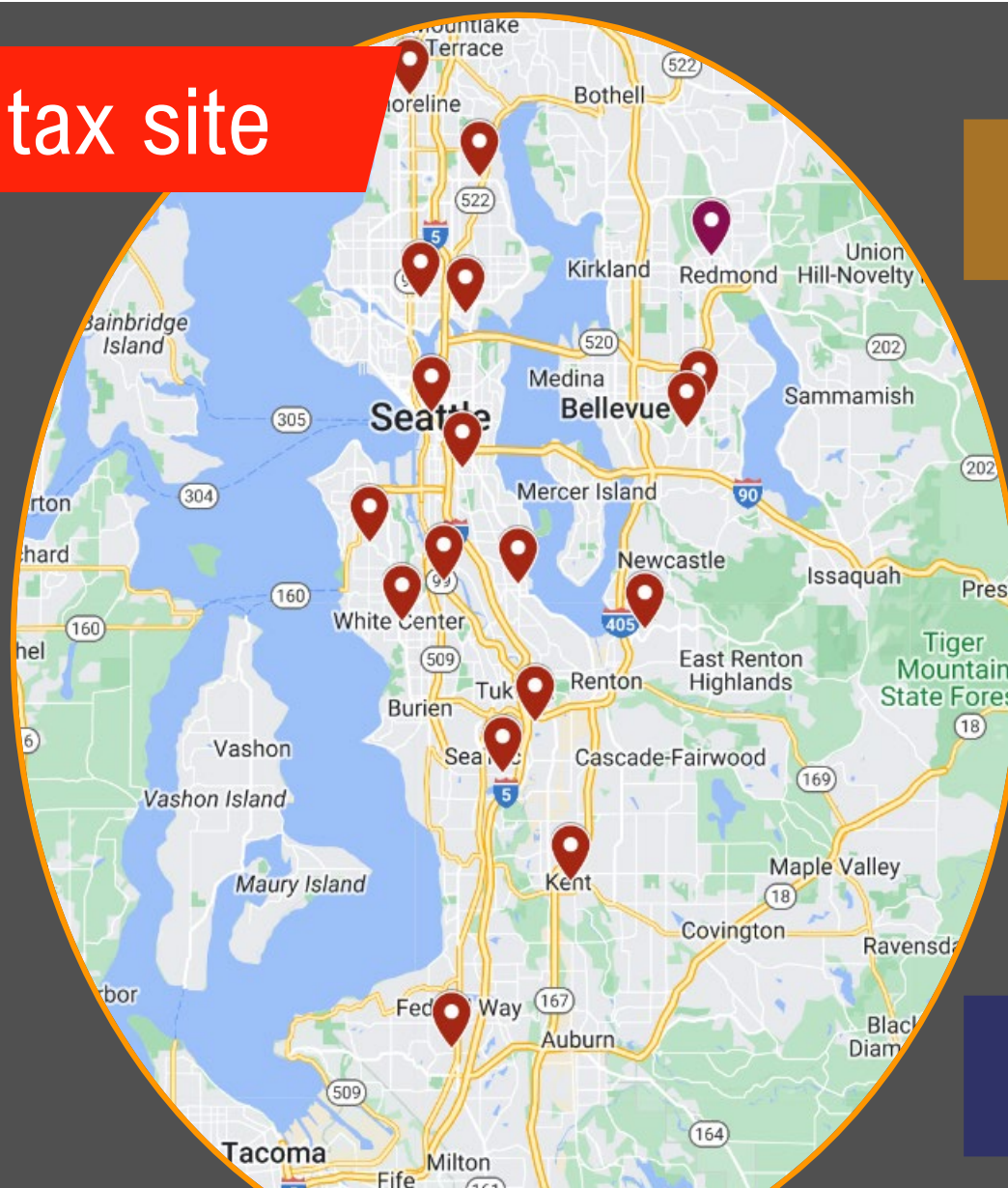
Upload photos of tax documents & proof of ID to GetYourRefund



Allow time for review & scheduling



Complete tax prep & quality review processes by phone



Weekday, evening or weekend?

- Days & hours vary by location
- Evenings & weekends tend to be busier, esp. close to the tax filing deadline

- Apply/renew Individual Taxpayer ID Numbers at select site
 - Onsite & over-the-phone language interpretation

Need ITIN services or language support?

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Next Steps



GO TO

www.freetaxexperts.org

- Learn more about tax prep options & additional services
- Interactive tool to locate nearest tax site & review site schedules
- Find answers to additional questions

PREP

Collect documents

- Photo ID & Social security card or ITIN
- All tax statements (W-2s, 1099s, etc.)
- Spouse, if filing jointly
- Know your deadlines: April 15th, May 17th & October 15th

VISIT

In-person or virtually

- **NO APPOINTMENT REQUIRED**
- Open through April 21st, some sites will reopen May 1st – July 31st

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