

# VOLUNTEER WITH FREE TAX PREP



Butler County  
**UNITED WAY**

Free Tax Prep, a Volunteer Income Tax Assistance (VITA) program funded by the IRS and United Way, helps families achieve economic well-being. Free Tax Prep helps individuals and families with limited resources keep more money in their pockets. **We assist people in preparing and filing their tax returns.**

- No previous experience is necessary. Information and training sessions occur from November to January. Volunteers commit to work 3 shifts during tax season, February 19 through March 19.
- Volunteers test and certify online through the IRS.
- Site is located in Middletown, with shifts available Wednesday evenings and one Saturday morning.
- CPAs, CFPs and other qualified tax professionals can earn continuing education credits.

## Why?

- The IRS estimates 22% of eligible families do not claim the Earned Income Tax Credit (EITC), with a similar number missing out on the Child Tax Credit. An estimated two-thirds of eligible families who do not receive EITC do not file tax returns, due to cost or lack of resources.
- Commercial preparation services are cost-prohibitive and may offer predatory advances that incur further costs to taxpayers. Free Tax Prep saves community members \$275 in fees for each return prepared and helps them claim the refunds and credits they are due.
- Last year Free Tax Prep filed more than 8,000 returns, resulting in refunds and savings of over \$11.5 million for families with limited resources.

## Where?

Community Building Institute (CBI)  
800 Lafayette Avenue  
Middletown, OH 45044

## When?

- Information sessions and training: November - January
- Tax season: February 19 - March 19
- Volunteer shifts: Wednesdays, 5:30 pm - 8:30 pm, Saturday, March 8, 8:30 am - 12:30 pm
- Volunteer at least three shifts during tax season

## Training

- Live and asynchronous online training is provided in participation with United Way of Greater Cincinnati; total time to train is 10-12 hours, with multiple sessions on weekdays, weekday evenings and weekends.
- Volunteers test and certify online through the IRS.
- Certified volunteers are protected from liability.
- CPAs, CFPs and other qualified tax professionals can earn continuing education credits.

## Volunteer Opportunities

- **Individuals** can serve as greeters and/or screeners, tax preparers and reviewers, interpreters or translators, and site coordinators at community tax sites.
- **Corporate teams** can adopt an existing tax site and volunteer as a group; sponsor and run a community tax site of their own; or offer a “closed” tax site to their colleagues.

Sign up: <https://bc-unitedway.org/volunteer> or scan QR code



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Help families in Butler County prepare their tax returns, claim credits, and get the refunds they've earned.

## **VOLUNTEERS NEEDED**

Weeknights (Wednesdays and Weekend  
(Saturday)

Site locations in Middletown, Ohio

Training provided

Teamwork and support

IRS certification, college service-learning  
opportunities

Continuing education credits for CPAs, CFAs,  
and others

No previous experience is  
necessary. Volunteers  
commit during tax season,  
February- March.