

## Family Financial Management




## Free Tax Assistance Program

- Involved in South Madison project since 2002

# of returns from under 300 to over 3,000	Changed location 4 times
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Consistent Partners:  
Dane County, AARP, City of Madison, Dept of Revenue and the IRS

## Current Location



## 2019 Statistics

Single.....2,287	EIC.....\$1,178,786
Married Filing Joint.....497	CTC.....\$1,351,564
Head of Household.....368	Educ...\$ 89,956
Tax payers over 60...1,063	

Total Refunds	\$3,882,432
Balance Due Returns	506

## Who Used The Service?

African American.....30%	Male.....42%
White.....40%	Female.....56%
Asian.....13%	NA..... 2%
Latinx.....11%	
American Indian or Alaska Native..... 1%	Disabled.....22%
2 or More Races.....3%	Veteran..... 6%
NA.....2%	

## Extension's Role

- Recruit and manage "front of the house" volunteers
- Field taxpayer questions
- Coordinate volunteer scheduling with tax site coordinator
- Handle all rejected returns, issues



## Extension's Role...

- Coordinate special accommodation requests
- Provide and coordinate additional services
  - Covering WI
    - Health Insurance Assistance
    - Exemptions, options for health care



## Volunteers

- 60 preparers
- 14 greeters
- Used local small businesses for volunteer appreciation events



## Accomodations

- ADRC Wheelchair
- ASL interpreting service
- Spanish speaking staff and 2 Spanish speaking volunteers
- Hmong speaking volunteer
- UW Extension's Language Line



## Observations (Covering WI)

- There were numerous people applying for the hardship exemption due to homelessness and domestic violence.
- Many taxpayers stated employer covered insurance was too expensive
- Many folks appeared to qualify for Badger Care but had never applied
- Many seniors were not well informed on how to get supplemental coverage



## Observations (Karina)

- Changing Latinx demographics
- Tax implications for side jobs
- Credit invisibility



## Take-aways

- Increase community resource offerings
- Expand outreach for even more diverse volunteers
- Opportunity for educating persons new to this country on taxes, banking systems and other financial services

