



# NEWS

Dr. Nelson Ying Center • 1940 Traylor Boulevard • Orlando, FL 32804  
Phone (407) 835-0900 • Fax (407) 244-2805

## FOR IMMEDIATE RELEASE

Contact: Michele Plant – Director, Marketing & Communications  
Phone: (407) 429-2161, Email: [Michele.Plant@hfuw.org](mailto:Michele.Plant@hfuw.org)

---

## UNITED WAY HELPS QUALIFIED RESIDENTS CLAIM \$395 MILLION THROUGH EARNED INCOME TAX CREDIT

ORLANDO, Fla. (February 26, 2009) – Heart of Florida United Way (HFUW) has helped bring more than \$395 million back into the local economy through the Earned Income Tax Credit (EITC) program. HFUW has been promoting the EITC program for one year and today reported significant increases in the number of claims filed and the refund amounts paid to eligible residents for tax year 2007 – nearly \$400 million dollars. HFUW is promoting EITC through its Prosperity Campaign of Central Florida, the organization's new initiative to improve the financial stability of local families.

Established by the Federal Government in 1975, EITC puts money back into the hands of hardworking people and is credited with lifting more children out of poverty than any other federal program – an estimated five million families per year.

For those who qualify, EITC refunds for tax year 2008 range from \$438 to \$4,824, which can make a huge difference to people struggling to survive in this difficult economy. Qualifying residents must have worked at some point during 2008 to be considered for the tax credit and some may even be eligible to claim up to \$14,000 by re-filing returns from the past three years.

By expanding on best practices and broadening its reach of the program throughout Orange, Osceola and Seminole counties, HFUW helped the program achieve the largest annual increase in the tri-county region since the program began in 1975. For the tax year 2007:

- 185,557 EITC claims filed (a 10 percent increase)
- \$395.1 million in EITC refunds to qualified residents throughout Orange, Osceola and Seminole counties
- In just Orange County, 124,488 claims were filed (a nine percent increase) and \$265.7 million distributed (a 12 percent increase).

Nearly \$1 billion in EITC refunds have been claimed regionally over the past four years. Even with significant increases, the Internal Revenue Service estimates that up to 25 percent of eligible people failed to claim the credit

(more)

because of lack of awareness. With an estimated one-in-four Central Floridians eligible to receive tax credits, the economic impact on individual lives and the community is tremendous.

The lack of awareness of this life-changing program is just one of the reasons why United Way assumed promotion of the program. "The need in our community has always been great and has grown rapidly with the growing economic crisis," said Larry Olness, HFUW Community Services Vice President. "At a time when many families and individuals can't make ends meet, an additional \$4,824 in disposable income can make a huge difference. Many people spend EITC dollars on basic necessities such as food and clothing, home and car repairs, medical treatment and other consumer goods or services that help boost the local economy."

More than 30 **free** tax preparation sites have been established in Central Florida by the IRS Volunteer Income Tax Assistance (VITA) and AARP Tax-Aide programs to help low income residents. At these sites, qualified residents can claim 100 percent of their tax refund quickly and easily – money is usually received in 10 days or less.

Among other EITC qualifying factors, applicant's income cannot exceed:

- \$12,880 (\$15,880 if married and filing jointly) if there is no qualifying child.
- \$33,995 (\$35,995 if married and filing jointly) if there is one qualifying child.
- \$38,646 (\$41,646 if married and filing jointly) if there is more than one qualifying child.

"The need is great, and the financial burden on our residents is even greater," said Brown. "We know this from the record number of calls coming into the United Way 2-1-1 & Elder Helpline. Last year was the busiest year ever with more than 115,000 calls – a 41 percent increase over 2007– and numbers continue to climb."

United Way 2-1-1 & Elder Helpline offers free referrals to more than 2,000 local programs and services – including EITC. "Utility, rent and food assistance are the top three reasons people dial 2-1-1 – which tells a lot about the staggering need many families are currently facing," Brown said. "And with so many Central Floridians dealing with job cuts and reduced wages, thousands more may qualify for EITC refunds this year."

Recognizing the tremendous impact EITC dollars have on communities, the JPMorgan Chase Foundation, The Wachovia Foundation and the Wal-Mart Foundation are providing additional support by sponsoring the Prosperity Campaign.

"At Chase, we choose to fund programs that help families better their financial lives and help to strengthen communities," said Helen Stewart, regional Global Philanthropy manager for JPMorgan Chase & Co. "We are happy to support the promotion of Heart of Florida United Way's Earned Income Tax Credit program this year,

(more)

### **Page 3...United Way Helps Qualified Residents Claim \$395 Million through Earned Income Tax Credit**

enabling more low-income taxpayers access to tax credits, free tax preparation assistance and other financial services which can make families' lives a little easier."

Another key sponsor of the program is Wachovia Foundation. "We are delighted the Wachovia Foundation was able to support Orlando's Prosperity Campaign," said Valerie Hendriex, Community Development Officer for Wachovia. "This important initiative closely aligns with our commitment to promote financial literacy and build prosperity in our communities, especially in these challenging times."

HFUW offers free EITC information sessions to further explain the program and helpful **free** materials in English, Spanish and Creole for employers to help employees take advantage of program benefits. For businesses to schedule an EITC business presentation or request outreach materials, please contact Brittany Richards, EITC Manager, at (407) 429-2177 or email [brittany.richards@hfuw.org](mailto:brittany.richards@hfuw.org).

For general information about the program, please visit [www.hfuw.org](http://www.hfuw.org), dial 2-1-1 or visit [www.irs.gov](http://www.irs.gov).

#### **About Heart of Florida United Way**

Heart of Florida United Way is Central Florida's most comprehensive health and human services charity and the largest provider of funds to the region's most critical health and human service programs. The organization also operates United Way, 2-1-1 & Elder Helpline, Central Florida's community information and referral helpline; a Volunteer Resource Center; a Gifts In Kind Center; a Stewardship program that works with agencies to provide emergency assistance; and the Ryan White Part B program, which administers nearly \$2 million to much needed HIV/AIDS services and referrals. Heart of Florida United Way impacts more people annually than any other charity operating in the tri-county area, and partners with local businesses, government, other charities and individuals to increase awareness of local health and human service issues and to inspire hope, provide options and create possibilities for the people in our community. Visit [www.hfuw.org](http://www.hfuw.org) for more information.

###