



NEWS

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FOR IMMEDIATE RELEASE

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UNITED WAY HELPS QUALIFIED RESIDENTS CLAIM MORE THAN \$422 MILLION THROUGH EARNED INCOME TAX CREDIT

ORLANDO, Fla. (March 15, 2010) – Heart of Florida United Way (HFUW) today reported that the organization helped bring more than \$422 million back into the local economy through the Earned Income Tax Credit (EITC) program last year. Since tax year 2003, the year before the EITC program was introduced in Central Florida, the number of EITC dollars has increased by 48-percent (\$285.9 million to \$422.4 million). HFUW partners with the IRS to promote EITC through its *Prosperity Campaign of Central Florida*, which promotes financial stability for local families.

Established by the Federal Government in 1975, EITC puts money back into the hands of low-to-moderate income people and is credited with lifting more children out of poverty than any other federal program.

For those who qualify, EITC refunds for tax year 2009 range from \$457 to \$5,657, which can make a huge difference for people who are struggling to survive in this difficult economy. Qualifying residents must have worked at some point during 2009 to be considered for the tax credit and some may even be eligible to claim more than \$19,000 by re-filing returns from the past three years if the benefit was not already claimed.

By building on best practices and broadening the program's reach in Orange, Osceola and Seminole counties, HFUW has helped expand local EITC awareness and success. In the two years since HFUW and the IRS began partnering to promote EITC in the tri-county region, refund dollars have increased from \$349 million to \$422 million.

EITC summary for tax year 2008:

- 190,528 EITC claims were filed regionally
- \$422 million in EITC refunds were distributed to qualified tri-county residents (a 7 percent increase over 2007)

(more)

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- The percentage of claims filed at free tax preparation sites, or via other no-cost methods, reached an all-time high of 35.4 percent.

In all, more than \$1 billion in EITC refunds have been claimed regionally over the past six years. Even with significant increases, the Internal Revenue Service estimates that one-in-four of eligible people failed to claim the credit because of lack of awareness. This is one of the many reasons why United Way assumed local promotion of EITC in 2008.

“Community need has always been great, but through United Way 2-1-1, our 24-hour helpline and crisis hotline, we see that it’s reaching unprecedented levels due to the continuing economic crisis,” said Robert H. (Bob) Brown, President/CEO of HFUW. “Last year was the busiest year ever with more than 119,000 calls – a 4 percent increase over 2008 and a 47 percent increase over 2007. And they’re mostly calling for basic needs such as utility, rent and food assistance. At a time when many families and individuals can’t make ends meet, an additional \$5,657 in disposable income can make a huge difference and help boost the local economy.”

To ensure people receive every dollar they’re entitled to, United Way also promotes more than 30 **free** local tax preparation sites established by the IRS Volunteer Income Tax Assistance (VITA) and AARP Tax-Aide programs. Qualified residents who visit these sites can claim 100 percent of their tax refund quickly and easily and money is usually received in 10 days or less.

Orlando resident Olivia Lindy, a retired special needs teacher and a volunteer United Way 2-1-1 call specialist, is one of thousands of tri-county residents who benefitted from EITC for the first time this year. By filing at a local AARP tax site, she received a refund of \$700, which she used to pay off the mortgage on her Habitat for Humanity home. She also avoided paying exorbitant fees for commercial tax prep help, which in the past, had amounted to 50 percent or more of her overall refund.

“With the economy as bad as it is, EITC is a real blessing,” said Lindy. “Getting your taxes done for free makes it even better.”

Among other EITC qualifying factors for tax year 2009, applicants’ income cannot exceed:

- \$13,440 (\$18,440 if married and filing jointly) if there is no qualifying child.
- \$35,463 (\$40,463 if married and filing jointly) if there is one qualifying child.
- \$40,295 (\$45,295 if married and filing jointly) if there are two qualifying children.
- \$43,279 (\$48,279 if married and filing jointly) if there are three or more qualifying children.

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Recognizing the tremendous impact EITC dollars have on communities, the Wachovia Wells Fargo Foundation; the JPMorgan Chase Foundation; and the Wal-Mart Foundation are providing additional support by sponsoring the Prosperity Campaign of Central Florida.

HFUW offers 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, Senior Manager of Community Investment, at (407) 429-2177 or email Brittany.Richards@hfuw.org.

For general information about the program, including free available resources, please visit www.hfuw.org, dial 2-1-1 or visit www.irs.gov.

About Heart of Florida United Way

Heart of Florida United Way (HFUW) 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. Last year it raised and managed \$24.3 million throughout Orange, Osceola and Seminole counties. HFUW is working to advance the common good by focusing on education, income, health and safety. It also operates United Way 2-1-1 & Elder Helpline, Central Florida's community crisis and suicide hotline and 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. HFUW 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 for more information.

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