

## Maximize the Financial Capability of Veterans by Integrating MyFreeTaxes

### What is MyFreeTaxes? The MyFreeTaxes Partnership?

- Taxpayers earning \$58,000 or less can prepare and file their federal and state taxes online and in person for FREE in all 50 states and the District of Columbia through the MyFreeTaxes Partnership.
- The MyFreeTaxes Partnership is a collaborative national initiative of Goodwill Industries International, National Disability Institute and United Way Worldwide sponsored by the Walmart Foundation.
- Since 2009, the MyFreeTaxes Partnership has helped millions of low- to moderate-income individuals and families increase financial stability through in-person traditional, volunteer income tax assistance (VITA) and online self-tax preparation through [www.MyFreeTaxes.com](http://www.MyFreeTaxes.com).

### What is National Disability Institute (NDI)?

- National Disability Institute is the first national nonprofit organization dedicated exclusively to building a better economic future for people with disabilities.
- NDI launched the Real Economic Impact Network, a national initiative capturing the power of collaboration with the IRS and more than 900 community partners in more than 100 cities across America to foster full participation of people with disabilities in the economic mainstream.
- NDI provides training, technical assistance, support and resources in six key areas: financial education, tax preparation, benefits planning, employment, asset building and public policy.

### Why MyFreeTaxes for veterans?

- Department of Veteran Affairs reports 22.5 million veterans in the U.S. and more than 37 million veterans, dependents or survivors are eligible for veterans benefits.
- Veteran Statistics underscore the need for financial capability strategies for veterans and their families, who are entitled to and in need of resources to maintain and build financially secure futures.
- A veteran lives in one in five households benefiting from the Low Income Home Energy Assistance Program.
- The U.S. Census Bureau reports:
  - 1.5 million veterans are at risk for homelessness
  - In 2009, the median income of a veteran was \$35,622, qualifying many to use [www.MyFreeTaxes.com](http://www.MyFreeTaxes.com)

### Why partner with NDI's MyFreeTaxes Initiative?

- MyFreeTaxes is a FREE, reliable, national resource available for integration into your current array of services.
- MyFreeTaxes serves a diverse customer-base, including those who may be unemployed, struggling to stay within low-to moderate income range once employed, and/or challenged to develop assets.
- Organizations that incorporate on-site tax preparation into their service delivery models report that participants have a better set of tools to find work, obtain benefits that help build sturdier financial futures, and have a higher likelihood of completing a skills program and/or staying on a job longer.
- Of the 23.6 million military veterans in the U.S., six million had disabilities with nearly half of all veterans returning from current conflicts having service-connected disabilities.
- NDI staff has experience both personally and professionally related to disability and the military and veteran community, and can closely support your efforts to integrate MyFreeTaxes within your service delivery model.

## 2014 Expansion of MyFreeTaxes in the Veterans Community

For the 2014 tax season, NDI will select and support at least 7-10 regions with a focus on veterans. Each of these regions will implement one of, or a hybrid of, the MyFreeTaxes models described below to help low- to moderate-income veterans and their families throughout the country increase their financial stability. Working with the IRS, NDI will be partnering with existing Veterans Affairs healthcare programs nationwide to offer MyFreeTaxes.

1. **Tax Coach Model:** NDI will work with select regions serving veterans to help recruit, fund and manage an IRS-certified tax coach to work within selected veteran organizations during tax time. NDI will provide training and technical assistance to all tax coaches and veteran sites. Staff assigned to the project will receive access to the MyFreeTaxes partner portal which includes training, online resources and access to technical assistance and virtual workforce workgroups.

### **Veteran Organization Resources:**

- Veteran organization coordinates with NDI to recruit/hire certified Tax Coach.
- Veteran organization coordinates with NDI to identify varied MyFreeTaxes promotional activities.
- Use of MyFreeTaxes 'Playbooks' and partner portal to help with outreach and marketing plans/efforts.
- Veteran organization designates telephone line for Tax Coach to schedule customers to self-file
- Veteran organization designates 2-3 computers during tax season for coached filing.

\*NDI will provide a laptop for Tax Coaches for MyFreeTaxes activities, correspondence and coaching.

2. **Integration Model:** NDI will work with select American Job Center (AJC) regions to fund and support outreach and marketing efforts, as well as integration of free tax preparation and EITC through workforce services to the veteran community. AJCs will receive access to the MyFreeTaxes partner portal which includes training, online resources and access to technical assistance and virtual workforce workgroups. NDI will engage the Disabled Veteran Outreach Program (DVOP) staff to boost outreach efforts to veterans.

### **American Job Center (AJC) Resources:**

- Participation by DVOP in MyFreeTaxes virtual trainings, workgroups and reporting of efforts around veterans
- Coordination with NDI and use of MyFreeTaxes partner portal to develop outreach/marketing plan
- Outreach and dissemination of MyFreeTaxes marketing materials to veteran community

3. **Network Model:** Veteran organizations register with NDI for a free, custom MyFreeTaxes.com URL and promote it to their veterans, staff, employers and community partners to expand access to free tax preparation and EITC. Network model participants receive access to the MyFreeTaxes partner portal which includes training, online resources and access to technical assistance and virtual workforce workgroups.

### **Veteran Organizations:**

- Participation by designated veteran staff member(s) in MyFreeTaxes virtual trainings and workgroups
- Use of MyFreeTaxes 'Playbooks' and partner portal to help with outreach and marketing plans/efforts
- Outreach and dissemination of MyFreeTaxes marketing materials to veteran community
- Veterans Healthcare Programs -The VA's Veterans Justice Outreach Coordinators (VJOs) will work with NDI and the IRS to conduct outreach and promotion of MyFreeTaxes through existing VA healthcare programs and facilities including the VA's healthcare system's 152 hospitals; 800 community based outpatient clinics; 126 nursing home care units; and 35 domiciliaries.
- NDI provides individualized technical assistance to VJOs to support efforts through virtual training, ongoing workgroups and in-person site visits.
- Use of MyFreeTaxes 'Playbooks' and partner portal available to help with outreach and marketing efforts
- Dissemination of MyFreeTaxes marketing materials to VA programs and healthcare facilities.

***Interested in how you can get involved with NDI's MyFreeTaxes veterans' initiative?***

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