



ORANGE COUNTY UNITED WAY'S FREE TAX PREP CAMPAIGN 2019 OUTCOMES (TY 2018)

- **20,750 clients served**¹ throughout Orange County bringing almost **\$17.7 million** in **federal refunds**², over **\$4.8 million** in **federal EITC** alone. A minimum of **\$4.2 million** saved in **preparation fees**³. That is a **\$21.9 million impact in Orange County!**
 - ❖ Average Adjusted Gross Income (AGI) of taxpayers served is **\$23,757**
 - ❖ **9,682** taxpayers served are age 60+
 - ❖ Free Tax Prep Campaign grew by **9%** in transmitted returns
- **8,369 calls received** (United Way's Tax Appointment Hotline)
- **33 partner organizations participated**
- **61 free tax preparation sites supported**⁴
- Over **450 free tax preparation events hosted**
- **45 volunteer and partner training sessions administered**
- Over **500 OCUW volunteers and partner agency staff members trained**
- **456 individuals certified and served**⁵
- Over **17,621 VITA/FSA volunteer hours contributed**
- **6 VITA College Interns engaged** at 4 OCUW-sponsored sites

¹ As of 5/07/2019. Clients served includes: returns prepared with TaxSlayer Online software by certified volunteers, paper returns submitted to IRS through the campaign, and returns prepared using MyFreeTaxes by the taxpayer.

² Final total refund returned to Orange County pending data update to include state refund amount. Total federal and state refund amount estimated to rise.

³ California average tax preparation fee of \$202 for Federal Form 1040 (not itemized) with State Return based on National Society of Accountants online Fee Calculator (2016-2017).

⁴ Comprised of 33 VITA/FSA & 28 AARP Tax-Aide sites.

⁵ Through OC United Way, excluding AARP Tax Counselors