

MAKING A DIFFERENCE



Grand Challenges

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Grand Challenge: Community Vitality

Title: IRS Trained Volunteers Provide Free Tax Assistance in Shawnee County

Why is this issue important?

Filing a tax return can require a level of financial literacy and knowledge of tax law that many do not possess. It can also be quite expensive. The IRS estimates the value of having a tax return prepared at \$225, but the cost goes up with the number of forms completed on the return. The cost can be a barrier to taxpayers. However, if they don't file, they may miss out on tax credits and deductions they may be entitled to.

How did Extension address this issue?

Susan Fangman, Family & Consumer Sciences Agent, gives leadership to the Asset Building Coalition in Shawnee County. This group represents both Volunteer Income Tax Assistance (VITA) and AARP tax volunteers. This coalition works with educational, government and social services agencies in Shawnee County to provide the space, materials and manpower to provide free tax assistance to those in need.



What was the impact?

During the 2023 filing season (2022 tax year) about 60 volunteers in Shawnee County filed 3,313 federal returns, with a similar number of state returns. Assistance was offered at 6 in-person sites and by mail. Free tax assistance saved Shawnee County taxpayers approximately \$745,000 in tax preparation fees. It also helped taxpayers receive \$3,454,735 in total refunds (federal and state), and place on record over \$730,500 in tax liabilities. The average adjusted gross income (AGI) of those served at Shawnee County sites was \$29,568. Free tax assistance has a public value to all taxpayers with refunds contributing to an infusion of money back into the local economy.