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THE CITY MAKES IT EASIER FOR NEW YORKERS TO FILE TAXES FOR FREE WITH MORE SITES THAN EVER BEFORE AND VIRTUAL SITES WHERE FILERS CAN DROP OFF TAX DOCUMENTS AND PICK UP COMPLETED RETURNS LATER

Department of Consumer Affairs Kicks Off the City's Annual Tax Campaign and Urges Any New Yorker Who Made \$58,000 or Less to File for Free

Department of Consumer Affairs (DCA) today launched New York City's 12th Annual Tax Credit Campaign. The tax season has begun and the IRS is now accepting 2013 returns. This year, the City has more free ways to file a return than ever before with the expansion of the Virtual VITA (Volunteer Income Tax Assistance) program. Fast, easy and convenient, Virtual VITA sites are coordinated by the Food Bank For New York City and taxes are completed by IRS-trained preparers. They allow filers to drop off their tax documents and return later to review and file the completed return. Across the five boroughs, there are 100 free sites, both virtual and traditional and eligible New Yorkers also have the option to file for free online at nyc.gov/taxprep (link to: www.nyc.gov/taxprep). The SaveUSA program is also offered at select VITA sites for its seventh year. SaveUSA is unique savings program for tax filers that offers a 50 percent match if they deposit at least \$200 of their tax refund into a SaveUSA account and maintain the deposit for one year.

"The City's Tax Credit Campaign has been pivotal in getting money back for New Yorkers who need it most," said DCA First Deputy Commissioner Alba Pico. "This year, with the expansion of Virtual VITA sites, families can drop off their tax documents and pick up the completed returns later, making it easier than ever to do their taxes for free without taking time off from work or school. We also encourage eligible New Yorkers to open a SaveUSA account as soon as possible as funding is limited."

This year, the City expanded its tax preparation program to include additional Virtual VITA sites. This innovative program, offered in partnership with the Food Bank For New York City, links eligible New Yorkers to easier and faster ways of filing their returns. Filers can drop their required tax documents at a Virtual VITA site, continue on with their day and, after being notified that their return is ready, come back to the site at their convenience to review and file the completed return. At these sites, intake staff will upload the tax documents through a secure platform and an off-site, IRS-certified tax preparer will prepare the return. Preparers will be able to contact clients to confirm

information or conduct any follow-up needed. DCA recently released a report, [Virtual VITA: Expanding Free Tax Preparation/Program Insights](#), (link to: [VirtualVITAProgramInsights.pdf](#)) highlighting findings from a small-scale pilot at two New York City Head Start programs during the 2013 tax season. In addition to saving time for busy filers, the Virtual VITA program is more cost-effective for the preparers: virtual returns are half the average cost per return as those completed through the traditional VITA program.

“At a time when we are all being asked to do more with less, Virtual VITA allows us to do just that – it is a highly efficient, lower-cost way to reach more New Yorkers who might not otherwise file a return to claim their refunds and credits,” said Dominique Jones, Chief Programs Officer of Food Bank For New York City. “Right now, 2.6 million New Yorkers are struggling to afford food. Food Bank For New York City’s Free Income Tax Services puts money back in the pockets of New Yorkers who need it most, and provides an economic boost in our neighborhoods. By working with our extensive network of emergency food providers, this year, we will be able to double our Virtual VITA sites throughout the five boroughs. ”

“I was in a difficult financial situation at this time last year and, with so much fraud out there, I wasn’t sure where to go. Luckily a friend told me about the Virtual VITA at Children’s Aid Society,” said Jackeline, a single mother of two who went to Food’s Bank’s Head Start pilot at Children’s Aid Society last year. “I know and trust them and it was free, which alleviated a lot of stress. It was the best decision I ever made—it was very easy and quick and the staff told me exactly what to bring. I will definitely be using the program again this year and I’m recommending it to all of my friends.”

Free Tax Preparation

Since 2002, the City of New York has promoted the Earned Income Tax Credit (EITC) and encouraged New Yorkers to save money by filing through one of the City’s partner sites. All site information is available by calling 311 or visiting [nyc.gov/taxprep](#) (link to: [www.nyc.gov/taxprep](#)). Over the past 12 years, the City’s Tax Credit Campaign has helped New Yorkers collect nearly \$20 billion in federal, State and City refunds, including \$1 billion directly through the City’s network of free and low-cost sites. Last year, close to 100,000 New Yorkers filed their taxes through one of the City’s free or low cost options to claim more than \$149 million in tax credits and refunds.

The City’s Annual Tax Credit Campaign increases awareness about tax credits that puts money back in the pockets of working New Yorkers, and helps qualifying New Yorkers file their taxes online for free. New Yorkers eligible to receive the EITC could receive up to \$8,159 and working families with children three years old and younger could be eligible for up to \$1,733 with the New York City Child Care Tax Credit (NYC CCTC). The NYC CCTC assists families with low incomes, or who are underemployed, with the cost of child care.

The City’s free tax filing options:

- New Yorkers with children who earn up to \$52,000 or those without children who earn \$18,000 or less can visit one of more than 100 free VITA sites in the five boroughs. Both traditional and Virtual VITA sites have an IRS-certified preparer complete the return.
- New Yorkers with a valid e-mail address who earned less than \$52,000 can file their return for free at a select sites where filers prepare their own return online (using a secure website) with some help from a certified volunteer.
- New Yorkers earning less than \$58,000 can file their taxes online for free at nyc.gov/taxprep (link to: www.nyc.gov/taxprep). The City partners with Intuit Inc.'s Turbo Tax Freedom Edition, Goodwill Industries International and myfreetaxes.com, powered by H&R Block, to offer these services.

SaveUSA

New Yorkers visiting one of five designated VITA sites have the opportunity to participate in the City's SaveUSA program while funds last. Participants receive a 50 percent match, up to \$500, if they deposit at least \$200 of their tax refund into a SaveUSA account and maintain the initial deposit for one year. There is no penalty for withdrawing refund deposits before the end of the year but those who do become ineligible for matching funds. Last year in New York City, almost 700 tax filers with low incomes saved nearly \$668,000 through SaveUSA, which includes initial savings plus matching funds. These 2013 savers received close to \$223,000 in matched funds on February 1. SaveUSA has also been replicated in San Antonio, Newark, and Tulsa and has incentivized 4,769 Americans to save close to \$4 million. Supported by the Ford Foundation, the MetLife Foundation, Bloomberg Philanthropies and other private funders through a Social Innovation Fund grant from the federal Corporation for National and Community Service, awarded to the Mayor's Fund to Advance New York City and coordinated by the Center for Economic Opportunity, this national replication project is implemented locally through the Food Bank For New York City and Ariva, in partnership with Capital One Bank, Spring Bank and Carver Federal Savings Bank.

Tax Preparation Required Documents

When having someone prepare your taxes in person, bring:

- Proof of identity, such as a driver's license or other photo ID
- Social Security cards for yourself, your spouse, and your dependents and/or a Social Security Number (SSN) verification letter from the Social Security Administration OR Individual Taxpayer Identification Number (ITIN) letter for all names on the return (original or copies)
- Birth dates for yourself, your spouse, and the dependents on the return
- Wage and earning statement from your employer(s): Form W-2, W-2G, 1099-R
- Interest and dividend statements from banks (Forms 1098 and 1099)
- A copy of your 2012 federal and state returns, if available
- Proof of any other income, e.g., lottery winnings

- Total paid for child care provider and the provider's Taxpayer Identification Number or SSN (if you are claiming the New York City Child Care Tax Credit)
- Bank account and routing numbers (if you are directly depositing your refund). Note: If you use direct deposit, you should receive your federal tax refund within 21 business days.
- To file a Married Filing Jointly return, both spouses must be present to sign required forms.

When preparing taxes online, you'll need:

- Social Security Number (SSN) OR Individual Taxpayer Identification Number (ITIN) for yourself, your spouse, and the dependents on the return
- Birth dates for yourself, your spouse, and the dependents on the return
- Your 2012 Adjusted Gross Income (AGI) or Self-Select PIN number. (AGI is the amount shown on your 2012 Form 1040, line 38; Form 1040A, line 22; or Form 1040EZ, line 4. The Self-Select PIN is the five-digit PIN you used to electronically sign your 2012 return.) If you cannot find this information, call the Internal Revenue Service (IRS) at 1-800-829-1040.
- Wage and earning statement from your employer(s): Form W-2, W-2G, 1099-R
- Interest and dividend statements from banks (Forms 1098 and 1099)
- Proof of any other income, e.g., lottery winnings
- Total paid for child care provider and the provider's Taxpayer Identification Number or SSN (if you are claiming the New York City Child Care Tax Credit)
- Bank account and routing numbers (if you are directly depositing your refund). Note: If you use direct deposit, you should receive your federal tax refund within 21 business days.

DCA enforces the Consumer Protection Law and other related business laws throughout New York City. Empowering consumers and businesses to ensure a fair and vibrant marketplace, DCA licenses almost 80,000 businesses in 55 different industries. Through targeted outreach, partnerships with community and trade organizations, and informational materials, DCA educates consumers and businesses alike about their rights and responsibilities. The DCA Office of Financial Empowerment (OFE) was launched at the end of 2006 as the first local government initiative in the country with the specific mission to educate, empower, and protect individuals and families with low incomes. OFE creates innovative programs, products, and services for New Yorkers so they can build assets and make the most of their financial resources. Our goal is to increase access to high-quality, low-cost financial education and counseling; connect individuals to safe and affordable mainstream banking and products and services; improve access to income-boosting tax credits, savings, and other asset building opportunities; and enforce and improve consumer financial protections to safeguard financial stability. For more information, call 311 or visit DCA online at [nyc.gov/consumers](http://www.nyc.gov/consumers) (link to: <http://www.nyc.gov/consumers>).