



through Volunteer  
Income Tax  
Assistance (VITA)

VOLUNTEER INCOME TAX ASSISTANCE

**VITA**

**United  
Way**



A UNITED WAY COLLABORATIVE

**Tax Season 2023 (Tax Year 2022)**

## Charlotte County residents were able to GET HELP AND GET HOPE

**907**

individuals served\*



**724**

households served\*

*average age 66*

*average Adjusted Gross Income \$25,500*

**1 IN 3**  
clients reside in the  
33952 or 33950 zip code

**Total Economic Impact: \$901,046**

**\$137,650**

Earned Income Tax Credits  
(for 79 households)

**\$48,645**

Child Tax Credits  
(for 40 households)

## Charlotte County volunteers were able to GIVE HELP AND GIVE HOPE

**POWERED  
BY  
GRACE**

**35**

volunteers recruited,  
trained, and deployed



2,440 hours



\$77,592 in-kind value



1,150 phone calls

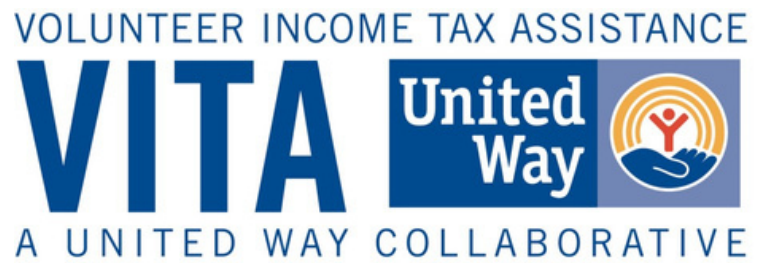
\*722 accept tax returns

[unitedwayccfl.org](http://unitedwayccfl.org)





stories  
of  
HOPE



Tax Season 2023 (Tax Year 2022)

## Charlotte County residents were able to GET HELP AND GET HOPE

### ● GOING THE EXTRA MILE

After filing his tax return, Derek received additional tax documents in the mail, and he needed to amend his tax return. Our team offered to schedule another appointment for Derek, but transportation was an issue, as he is elderly and blind. Karen drove to Derek's home to retrieve the documents directly from him, and she processed his amended return.

### ● 'TIS THE (TAX) SEASON

Michelle needed help with her taxes but was overwhelmed and hesitant about working with a stranger. Our intake team knew just how to ease her anxiety! They matched her with Ed, who bears a resemblance to Old Saint Nicholas. Ed worked with Michelle in his jolly way, and was able to inform her that she would be receiving a refund! She was thrilled with this news, and equally thrilled to have Santa as her tax preparer. She insisted on taking a photo with Ed, I mean, Santa, after their appointment was completed.

### ● MORE THAN JUST TAXES

Julia called our VITA team to schedule an appointment after receiving a dividend payment she was unsure how to handle. Our telephone team assessed the situation. By the time the call was over, Julia had an appointment to have her income taxes prepared for free and she was linked to our United at Work program to help her with financial assistance to help with home repairs from Hurricane Ian.

## Charlotte County volunteers were able to GIVE HELP AND GIVE HOPE

### ● IT'S A SMALL WORLD

Patrick was assigned a couple who clearly had spoke with Irish accents and who also loved to chat about anything besides taxes while he entered their information. They mentioned they were from a certain part of rural Ireland and by coincidence that was the same part of Ireland Patrick's mother came from. They went on to say that they came to the United States via Massachusetts many years ago, which was same route Patrick's mother happened to take. While it is doubtful their paths had ever crossed, this fun connection with VITA clients is an example of what makes volunteering so rewarding!