



# MORE Reporting

(Member Outreach and Reinvestment Endeavor)

Credit Union Name	Volunteer Income Tax Assistance Initiative Description	Contact information
Bethpage FCU	<p>2007 marked our fourth year of preparing tax returns to consumers with limited income through the VITA program. Approximately 240 returns were filed, at no charge to the consumer, at our 3 participating branches, for a total refund amount of \$248,461.</p> <p>In addition, Bethpage supports the LI EITC Coalition. EITC (Earned Income Tax Credit) is a credit that can be refunded to qualified filers. The LI EITC Coalition works with various organizations to increase awareness of the credit and therefore increase the number of people who receive it.</p>	<p>Kerry LaRosa, Executive Assistant <a href="mailto:klarosa@bethpagefcu.com">klarosa@bethpagefcu.com</a> 516-349-6737</p> <p><a href="http://www.bethpagefcu.com">www.bethpagefcu.com</a></p> <p>2/4/08</p>
GPO FCU	<p>Four years ago, GPO got involved in the VITA program through our participation in the Mohawk Valley Asset-Building Coalition. Staff certified to become VITA preparers and we booked appointments at our SEGs.</p> <p>A year later, the program took off. We applied for our own e-file number and coordinated a huge outreach through our SEGs. We rapidly became the lead preparer through the Coalition. In 2007, we prepared more than 300 returns for members and non-members. This year, about a quarter of GPO's staff volunteer for the program and we have a team of preparers from Hamilton College who volunteer at the credit union three - four days a week preparing returns for qualifying individuals. We are estimating that by the end of this tax season, we will have prepared 400 - 500 returns. We have had to limit our SEG visits because of logistics (ie. site number restrictions, laptop limitations, staffing concerns, etc.), but it has not impacted the program at all -- we have many, many repeat program participants and many others from the general public. In Herkimer County, one of our under-served areas, we have set up two sites to serve residents in those communities. We coordinated the program with publicity through the school districts. They used district newsletters to get the message out.</p>	<p>Jodi Blydenburgh <a href="mailto:jblydenburgh@gpoconnect.com">jblydenburgh@gpoconnect.com</a> (315) 724-1654, ext. 235</p> <p><a href="http://www.gpofcu.org">www.gpofcu.org</a></p> <p>2/19/08</p>

For more information contact the League by phone at (518) 437-8100 or toll free (800) 342-9835, or by e-mail at [info@nyscul.org](mailto:info@nyscul.org).

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GPO FCU (con't.)	<p>Also, we participated in the National EITC Day (earned income tax credit). We sponsored mini-seminars on establishing savings and checking accounts, as well as information on credit scores and ways to improve a credit score. We worked with the MV Asset-Building Coalition on this event. The key to our program's success has been getting staff participation. There are opportunities for all staff to participate -- even if they don't certify as preparers. For example, we have staff coordinating appointments and pre-screening participants; we have greeters; we have individuals who mail out confirmations; etc. February and March are very intense months at the credit union because -- obviously -- this is tax season. But, when it is over we recognize participating staff with a dinner.</p> <p>Annually, the IRS has sent representatives to the dinner who give our staff many accolades. As a side note, while the program's intention is to help individuals prepare their tax returns at no cost and to qualify for the earned income tax credit, our focus has also been on educating and encouraging sound personal financial management. As part of the VITA packets all participants receive, we include surveys to determine what money-related concerns they may have -- whether it be developing a savings plan for education or retirement or ways to improve a credit score. We can revisit these surveys and offer seminars or additional information as applicable to each individual. We also try to provide educational information in all the packets -- including identity theft, the benefits of direct deposit, etc. It is all a part of helping members and non-members manage the assets they have and maximizing their potential.</p>	

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ServU FCU	ServU Credit Union participated for the fourth year as a VITA tax site in February 2008. Taxes were prepared by ServU employees who volunteered their time to help provide this FREE service to the public. There were 346 taxes prepared with combined State and Federal refunds for 2007 in excess of \$650,000. The FREE service has saved thousands of dollars in tax preparation money that would have gone to national tax preparers and allowed the funds to be spent locally at businesses.	Lauran Wilson VP Development <a href="mailto:lwilson@servucu.com">lwilson@servucu.com</a> (607) 936-2293  <a href="http://www.servucu.com">www.servucu.com</a>  2/25/08

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