



**OC FREE
TAX PREP** 
LET'S TALK TAXES

TOOLKIT 2018



OCFREETAXPREP.COM



WELCOME

Through the OC FREE TAX PREP initiative, Orange County United Way, Citi Community Development and community partners work to break the cycle of poverty by increasing the number of financially stable households in Orange County.

As a coalition member, you play a unique role. Your efforts positively impact the financial health and resiliency of Orange County residents by assisting hard-working taxpayers keep more of their hard-earned money by:

- Conducting outreach and education about the OC FREE TAX PREP campaign
- Maximizing tax returns by helping tax filers access California and federal Earned Income Tax Credits (EITC)
- Providing free tax preparation services to low-income communities
- Developing Orange County’s workforce skills, through hosting VITA volunteers

Year after year, the OC FREE TAX PREP initiative helps create a better tomorrow for Orange County.

LAST YEAR:

18,000 TAX RETURNS FILED

\$16M IN FEDERAL AND STATE REFUNDS RETURNED

\$4.24M THROUGH EITC

\$3,570,000 SAVED ON TAX PREPARATION FEES

With your help, we hope to reach even more households this tax season and have prepared this marketing and outreach toolkit to facilitate spreading the word. On the following pages, you will find information about the OC FREE TAX PREP advertising, social media and outreach assets available to you. Please use these tools to connect with individuals and families throughout Orange County and help more people keep their hard-earned money.

[ACCESS COLLATERAL HERE](#)

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POSTERS

OC FREE TAX PREP posters are available in several sizes and languages to build awareness about the campaign and drive people to our comprehensive website. Please distribute throughout the community, post in publicly accessible places or share with workforces.



24" W X 36" H



8.5" W X 11" H



11" W X 17" H

NOTE: Spanish versions of all posters available at asset download location.



COMMUNITY FLYER

This multipurpose flyer is easy to print and distribute. Please help spread the message about OC FREE TAX PREP by getting this flyer to as many people in Orange County as possible. This is a great tool to engage your corporate partners.

GET YOUR TAXES DONE FOR FREE **OC FREE TAX PREP**
LET'S TALK TAXES

If your household income was less than \$60,000 in 2017, you may be eligible to file your taxes for free!

IT'S SIMPLE!

- File your own taxes at MyFreeTaxes.com.
- Or, schedule an appointment at a free tax preparation site. Call one of the locations on the back of this flyer.

If you worked in 2017 and your household earned income was less than \$54,000, you may qualify to receive over \$6,000 cash back from the federal and newly expanded California Earned Income Tax Credits (EITC). **You must file your taxes to claim the credits!**

WHAT DO I BRING WITH ME?

- Picture Identification
- Social Security Card or Individual Taxpayer Identification Number (ITIN) Letter for all individuals listed on the return
- W-2s, 1099s and all other tax-related documents for 2017
- Form 1095-A, B or C health insurance coverage statement
- All 1098-E and T forms for educational expenses
- Childcare provider name, address, phone number and Tax ID Number
- Voided check if using direct deposit for refund
- Copy of your 2016 income tax return
- For joint returns, both spouses must be present to sign the required forms

HOW DO I QUALIFY FOR EITC?

- Be a U.S. citizen or resident alien for all of 2017
- Have a social security number valid for employment
- Earned income during 2017
- Cannot use "Married Filing Separately" filing status
- Cannot be claimed as a qualifying child
- Cannot file Form 2555 or 2555-EZ (relating to foreign earned income)







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8.5"W X 11"H (FRONT)

2018 FREE TAX PREP LOCATIONS **OC FREE TAX PREP**
LET'S TALK TAXES

<p>AARP Tax-Aide ① 888.227.7669 Multiple locations</p> <p>Abiding Savior Lutheran Church ① 23262 El Toro Road Lake Forest, CA 92630 abidingsavior.com/vita</p> <p>Abrazar, Inc. ① 7101 Wyoming Street Westminster, CA 92683 714.278.4679</p> <p>Access California Services ① <i>MyFreeTaxes.com site</i> 631 South Brookhurst Street, Suite 107 Anaheim, CA 92804 714.917.0440</p> <p>Anaheim Independencia Family Resource Center ① 10841 Garza Avenue Anaheim, CA 92804 714.826.9070</p> <p>Bahia Village ① 13096 Blackbird Street Garden Grove, CA 92843 888.434.8248</p> <p>Boys & Girls Club of Santa Ana ① <i>MyFreeTaxes.com site</i> 950 West Highland Street Santa Ana, CA 92703 714.543.7212</p> <p>California State University, Fullerton ① 800 North State College Boulevard Fullerton, CA 92831 Walk-In: Fridays 9:00am-4:00pm Saturdays 9:00am-4:00pm Education Classroom Building Lower Level</p>	<p>Coastline Community College ① 12901 Euclid Street Garden Grove, CA 92840 Walk-In: Fridays 1:00-3:00pm</p> <p>County of Orange Social Services Agency ① 1928 South Grand Avenue Santa Ana, CA 92705 888.434.8248</p> <p>Cypress Community Park ① 255 Visions Irvine, CA 92620 888.434.8248</p> <p>Downtown Anaheim Community Center ① 250 East Center Street Anaheim, CA 92805 714.765.4500</p> <p>El Modena Family Resource Center ① 18672 East Center Avenue Orange, CA 92669 714.532.3959</p> <p>Family Assistance Ministries ① 1030 Calle Negocio San Clemente, CA 92673 949.492.8477</p> <p>Good Hands Foundation - Korean Community Service Center ① 7212 Orangehope Avenue, Suite 9A Buena Park, CA 90621 714.449.1125</p> <p>Irvine One-Stop Center ① <i>MyFreeTaxes.com site</i> 17891 Carwright Road, Suite 100 Irvine, CA 92614 Computer Center only, file on your own. Walk-In: Monday-Friday 9:00am-2:00pm</p>	<p>Irvine Valley College ① 5500 Irvine Center Drive, B5TC Irvine, CA 92618 888.434.8248</p> <p>Miraflores Family Resource Center ① <i>MyFreeTaxes.com site</i> 2600 East Miraflores Way Anaheim, CA 92805 Walk-In: Tuesdays/Thursdays 1:30-4:30pm</p> <p>San Francisco Solano Church ① 22082 Antonio Parkway Rancho Santa Margarita, CA 92688 949.585.7767</p> <p>Santa Ana College ① 1530 West 17th Street Caesar Chavez Building A, Room A106 Santa Ana, CA 92706 888.434.8248</p> <p>Santiago de Compostela ① 21682 Lake Forest Drive Lake Forest, CA 92650 949.951.8559</p> <p>SMEIDA ① 1601 West 2nd Street Santa Ana, CA 92703 714.547.4073</p> <p>St. Kilian Church ① 26872 Estacioneros Drive Mission Viejo, CA 92691 949.586.4440</p> <p>Templo Calvario Church ① 2501 West 5th Street Santa Ana, CA 92703 888.434.8248</p>
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Orange County United Way

Appointment required for on-site assistance. Free tax sites cannot prepare returns with all types of income or expenses. Please verify with the appointment representative or site greater that your return can be prepared. An appointment is not a guarantee of service.

8.5"W X 11"H (BACK)

NOTE: Available in English, Spanish, Korean, Vietnamese and Farsi.



POSTCARD

More compact than a flyer, this postcard — also available in multiple languages — is the perfect leave-behind. Consider placing stacks of these postcards in high-traffic areas, like laundromats, health centers, places of worship, community centers, work places and educational centers.

KEEP MORE OF YOUR HARD-EARNED MONEY

FILE YOUR TAXES FOR FREE

Households earning less than \$54,000 may qualify for up to **\$6,000 cash back** in California and federal Earned Income Tax Credits (EITC) — **but only if you file.**

Claim what's yours. Make an appointment with one of our VITA volunteers for **FREE tax preparation.**

GET CASH BACK WITH EITC.

OC FREE TAX PREP
LET'S TALK TAXES

OCFREETAXPREP.COM

United Way Orange County United Way | citi | EITC | IRS | myfree taxes

6"W X 9"H (FRONT)

MANTENGA MÁS DE SU DINERO DIFÍCILMENTE GANADO.

PRESENTE SU DECLARACION DE IMPUESTOS DE FORMA GRATUITA

Si sus ingresos familiares son menos de \$54,000, usted puede calificar para un **reembolso de \$6,000** en sus impuestos de California y federal con El Crédito Tributario por Ingreso del Trabajo (EITC) - **sólo si declara sus impuestos!**

Reclame lo que es suyo. Haga una cita para que uno de nuestros voluntarios de VITA le prepare su declaración **GRATIS.**

OBTENGA REEMBOLSO CON EITC.

OC FREE TAX PREP
LET'S TALK TAXES

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United Way Orange County United Way | citi | EITC | IRS | myfree taxes

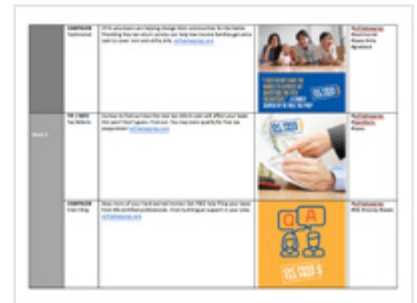
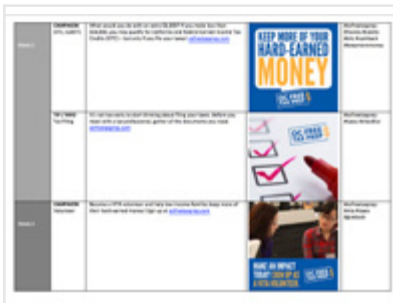
6"W X 9"H (BACK)

NOTE: Comes with English language on front and Spanish language on back.

SOCIAL MEDIA

SOCIAL MEDIA CONTENT

We have prepared sample social media content for Facebook and Instagram. You are invited to post these onto your own social media channels or use them as inspiration and write your own. 18 weeks of content and supporting images are available.



SOCIAL ADS

These social posts and ads are designed to drive awareness for the OC FREE TAX PREP campaign on Facebook and Instagram and are ready for you to add to your paid advertising strategy.

CAMPAIGN SPECIFIC



LET'S TALK TAXES
File your taxes for FREE with a trusted IRS-certified tax volunteer.
ocfreetaxprep.com



KEEP MORE OF YOUR HARD-EARNED MONEY
Families count on OC Free Tax Prep to ensure they receive the cash-back tax credits they've earned.
ocfreetaxprep.com



Filing your tax return is the only way to claim tax credits owed to you. Learn more.
ocfreetaxprep.com

SOCIAL ADS CONTINUED

EITC, CALEITC SPECIFIC



You work?
See how CalEITC works for you!
ocfreetaxprep.com

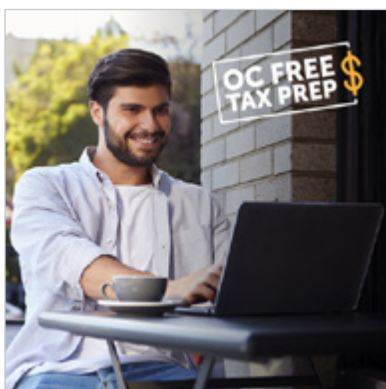


What would you do with an extra \$6,000?
Find out if you qualify for California and federal EITC.
ocfreetaxprep.com



The CalEITC tax credit can add dollars to your refund!
ocfreetaxprep.com

MY FREE TAXES SPECIFIC



File your taxes for free without leaving your home with MyFreeTaxes.com



Tax prep that's FREE, EASY & SAFE.
File your taxes for FREE online at MyFreeTaxes.com



Do you make less than \$66,000? See if you qualify to file your taxes for FREE.
MyFreeTaxes.com

THANK YOU!

It takes a community to create lasting change. Through our joint efforts to increase the financial stability of all Orange County, we build families' resiliency and capacity to strive, grow, and succeed.

The OC FREE TAX PREP initiative is made possible thanks to the generous support of community partners and funders. Our partner and volunteer dedication to the program is its strongest success.

