

\$60M in tax refunds in '16, with VITA help

By David Hendricks

STAFF WRITER

San Antonio's Volunteer Income Tax Assistance program has the largest force of volunteer certified tax preparers in the U.S., providing free filing services for people who earn less than \$60,000 a year, according to local officials.

"There may not be a free lunch, but there is free tax assistance," U.S. Rep. Lloyd Doggett, D-San Antonio, said during a Friday kickoff event at one of the VITA sites, the YWCA at 503 Castroville Road.

The San Antonio-based pro-

gram has 345 certified tax preparers at 18 walk-in sites, plus one in Fredericksburg. The program is in the process of training 541 more volunteers for certification. Additional volunteers are awaiting training.

J. Antonio Fernandez, Catholic Charities CEO and president, said 1,148 total volunteers have been recruited so far and more are sought. As new volunteers become certified, they will join the sites as the income tax season advances to its April 18 filing deadline.

VITA is operated by several supporting organizations, in-

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cluding Catholic Charities of the Archdiocese of San Antonio Inc., the city Department of Human Services and the United Way of San Antonio & Bexar County.

VITA was started by the Internal Revenue Service more than 40 years ago, but the agency turned the program over to local communities in 2001. Volunteers have to meet IRS training requirements.

Brooklyn, New York, has a larger VITA program, but it pays some of its preparers. San Antonio's VITA deploys the largest number of unpaid volunteers, local officials said.

Last year, the San Antonio VITA program filed 44,000 income tax returns that resulted in more than \$60 million in refunds and credits, the sponsors announced Friday.

The VITA program saved local residents an estimated \$8 million in tax-preparation fees last year.

Of the \$60 million in refunds, \$24 million of that were earned income tax credits to low-income families with children. Many people who qualify for the earned income tax credit and other tax relief don't need to pay federal taxes, but those tax credits often are overlooked, said Mayor Pro Tem Mike Gallagher.

"A lot of people don't know about it," Gallagher said. "That money goes back into the city of San Antonio."

VITA volunteers processed 34,331 tax returns in 2015, resulting in \$55 million in refunds and credits that year, officials said.

The VITA site at St. Philip's College, in Room 110 of the Bowden Building at 1801 Martin Luther King Drive on the East Side, historically is VITA's top-producing site. In 2016, the site

What to bring

Income tax individual and family filers with 2015 incomes of \$60,000 or less must bring the following items to VITA sites for free tax-filing services:

- ▶▶ Photo identity
- ▶▶ Social Security cards or individual tax identification numbers for all family members
- ▶▶ All W-2 forms
- ▶▶ Copy of prior-year returns, if applicable
- ▶▶ All 1099 forms, if applicable

MORE INFORMATION

- ▶▶ If filing jointly, spouses must be present to review and sign completed tax return forms.
- ▶▶ VITA sites and operating hours can be found online at www.vitasa.org and by telephone at 211.

Source: VITA sponsors

processed 4,568 returns, resulting in \$8.7 million in refunds and credits.

St. Philip's College also serves as one of three VITA sites that processes business tax returns.

Nationally, the IRS expects to process 153 million tax returns this year. The deadline is April 18, a Tuesday, instead of the traditional April 15, because April 15 falls on a Saturday and Emancipation Day, a legal holiday in Washington, D.C., will be observed on Monday, April 17.

Last year, the IRS issued almost 111 million refunds, about 73 percent of all returns. The average refund last year was \$2,857.

Early filers seeking EITC or child tax credit refunds may experience a delay this year, the IRS announced this month. To make it easier for the IRS to detect and prevent refund fraud, Congress passed a law recently that requires the agency to hold refunds on those credits until Feb. 15. EITC and child tax credit filers likely won't be able to access their refunds from their banks before the weekend of Feb. 27 because of the President's Day holiday and weekends, the IRS has warned.

All taxpayers can check the status of their refunds online at IRS.gov using the "Where's My Refund" tool.

VITA operates two year-round income tax clinics that prepare prior-year returns and amendments by appointment only.

The Catholic Charities' Guadalupe Community Center at 1801 W. César E. Chávez Blvd. prepares individual taxpayer identification numbers for individuals who do not have a Social Security number but need an ITIN to prepare their taxes.

Like the previous two years, VITA will offer an "express service" option, which allows qualified tax filers to drop off their forms and information at five sites for processing within 48 to 72 hours.

VITA volunteers also will be available to organizations, senior centers and apartment complexes on request for mobile, on-site service. The volunteer preparers will bring their equipment and will need space for several computers and electrical outlets. Organizations can call 210-222-2975 to arrange it.

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