

FORSYTH FREE TAX PROGRAM FACT SHEET



Experiment in Self-Reliance

PROGRAM OVERVIEW

ESR offers cutting edge programs to assist low-wealth citizens of Winston-Salem/Forsyth County. ESR's programs work to help clients become independent of assistance agencies. We do this through counseling, education, goal-setting and achievement activities. ESR's case managers work with each client to understand their goals, and help them create a plan to help them achieve their goals. Our programs connect clients with a wide variety of resources in the community based on each individual client's needs and goals. With the exception of the IDA Program, ESR's programs last a maximum of two years.

PROGRAM GOALS

- Provide FREE income tax return preparation and filing to low-income citizens in our community
- Help clients claim EITC refunds, if eligible
- Help the community reclaim more than \$12 million EITC refunds traditionally unclaimed in the community
- Connect citizens with asset-building programs that may be of interest to them
- Provide community volunteer opportunities

VITA site volunteers can prepare 1040EZ, 1040A, and many other 1040 returns, including common schedules and tax credits such as the Earned Income Tax Credit. Volunteers CANNOT prepare returns that include any of the following due to liability issues:

- Sale of Real Estate or Stocks
- Certain Types of Self-Employment Income

If you have any question about whether your tax return can be filed at a VITA site, or would like to volunteer at a VITA site, please contact ESR. CONTACT ESR FOR VITA SITE LOCATIONS AND SCHEDULES JANUARY THROUGH APRIL. RETURNS PREPARED BY APPOINTMENT, APRIL-DECEMBER.

INTAKE REQUIREMENTS

Tax information (W2s, 1099s, receipts for childcare or education expenses, receipts for charitable donations, interest statements)

Last year's return, if at all possible

Photo Identification

Social Security Cards for yourself, your spouse, and your dependents (We cannot accept SSNs not appearing on official documentation)

Bank Routing Number and Account Number(s) for direct deposit

ABOUT US

MISSION: Empower social and economic self-reliance for the working low income and homeless

VISION: ESR reduces poverty and homelessness in our community

VALUES: ESR is a judgement free zone full of respect for all in order to help everyone achieve their fullest potential

CONTACT

(336) 722-9400

3480 Dominion Street | Winston Salem, NC 27105

GENERAL: Mon - Fri 8:30 am - 5:00 pm

ORIENTATION: Tues 10:00 am - 11:00 am

Thurs 1:00 pm - 2:00 pm

FACEBOOK: www.facebook.com/EISR.org