



Creating a future of opportunity.

UpValley Family Centers' VITA Program

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The Volunteer Income Tax Assistance (VITA) Program, one of UpValley Family Centers' key services provided by our Economic Success program, is dedicated to helping low-income residents with free tax preparation services using trained staff and community volunteers. 2018 is our 17th year offering VITA services in Calistoga and St. Helena. Over \$5.5 million in refunds has been generated since 2010. (See attached growth chart.)

In 2018, we offered services at several locations: St. Helena office, Calistoga office, St. Helena Library and the three-farmworker housing complexes in Napa County. Year round services are available by appointment. During tax season (January-April), we offer regular evening and weekend hours. Call 707-965-5010.

Benefits of the VITA program:

- Local households save money by receiving **free tax preparation**, rather than paying for services.
- VITA **increases financial literacy** of local residents through the process of preparing tax returns. We help each client understand their tax return, how their taxes are calculated and what credits they can access.
- VITA creates **more disposable income**, which is then reinvested back into the community, further sustaining our local economy. We provide tools on the use of their refund, including options for saving. **As of May 23, 2018 we have submitted over 700 returns generating more than an estimated \$850,000 in federal and state refunds and credits.**
- Local community members get involved as **volunteers**. In 2018, the program was implemented by 36-trained volunteers (including 10 Business students from Pacific Union College) and 8 bilingual English-Spanish staff members.

VITA leadership provided by UpValley Family Centers:

- We provide tax return preparation instruction for volunteers countywide.
- We are the only agency offering VITA in rural Napa County.
- We are the only agency in Napa County processing Individual Tax Identification Numbers for residents without a social security number.
- We are the only agency in the counties of Napa, Solano, Sonoma and Lake processing tax returns year-round.
- We were leaders in the 2015 Bay Area savings pilot and 2016 savings initiative; in 2018 20% of our clients saved a portion of their refund.

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