

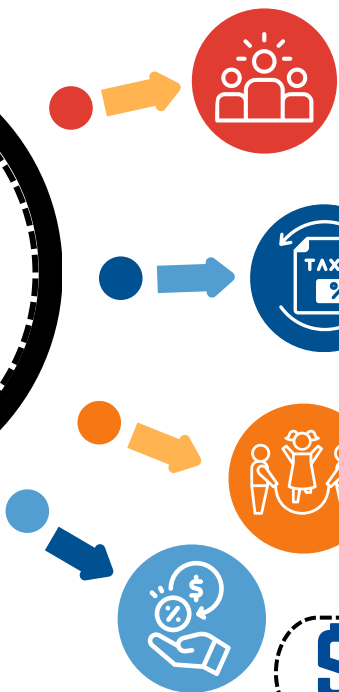


Tax Season 2024 (Tax Year 2023)

Through our VITA program, each interaction within our circle has been a beacon of light, illuminating pathways to empowerment and resilience.



53% increase in economic impact from tax season 2023



1209 served*
549 were 60+
We are committed to serving our senior community

1111 * accepted tax returns
increase of 387 from previous year
average Adjusted Gross Income \$26,599

\$70,125 Child Tax Credits

\$223,252 Earned Income Tax Credits

A survey was provided and 19% of respondents completed it. Here are some noteworthy highlights from clients.

- 31% of individuals use their refund to pay off debts.
- 36% opt to increase their savings with the refund.
- 34% chose VITA for its quality service.
- 13% needed community resources for assistance.

The true power of our impact lies in the reciprocity of our circle

Our volunteers and donors are vital to our organization, creating a "Circle of Hope" where acts of kindness lead to positive community change. **Economic impact includes taxpayer savings, total refunds, and financial equivalent of volunteer hours.*

41
volunteers recruited, trained, and deployed

4,208 hours
1,768 hours Increase from previous year!

\$140,926 in-kind value
Increase of \$63,334 from the previous year!

1,528 phone calls



Success Target:
Increase EITC Returns
2023: 79
2024 Target: 125

Target Result: 130
65% increase
5% over target

Estimated Tax Payer Savings
Total Savings: \$362,700

A \$300+ tax preparation fee could prevent individuals from buying groceries or needed medications.

	Total Tax Returns Accepted	Increase in Total Refunds	Earned Income Tax Credit
Port Charlotte	698 returns 71% increase	66% increase	\$145,658 108% increase
Punta Gorda	384 returns 32% increase	6% increase	\$73,931 9% increase

VITA Stories of Success



A FRESH START

Sarah, a resilient young mother facing financial difficulties, sought help to file three years of taxes. With support, she received a \$12,000 refund, bringing hope for a better future. The money promised to improve her and her child's living conditions, starting with buying shoes for her son. This experience transformed hope into reality, showing the impact of assistance in times of need.



GUIDED BY COMPASSION

In the quiet corners of our community lived Mary, an elderly woman, weathered by time and solitude. Isolated and burdened by the complexities of tax filings, Mary sought solace in our organization. She found herself at a crossroads with missing documents and a heart heavy with worry. However, guided by the warmth and compassion of our volunteers, Mary's journey took a hopeful turn. Through patience and perseverance, she completed her tax return in two visits. A sense of relief washed over her as she bid farewell to our office. Mary's story reminds us that a guiding hand and a listening ear can pave the way for a brighter tomorrow amidst life's uncertainties.