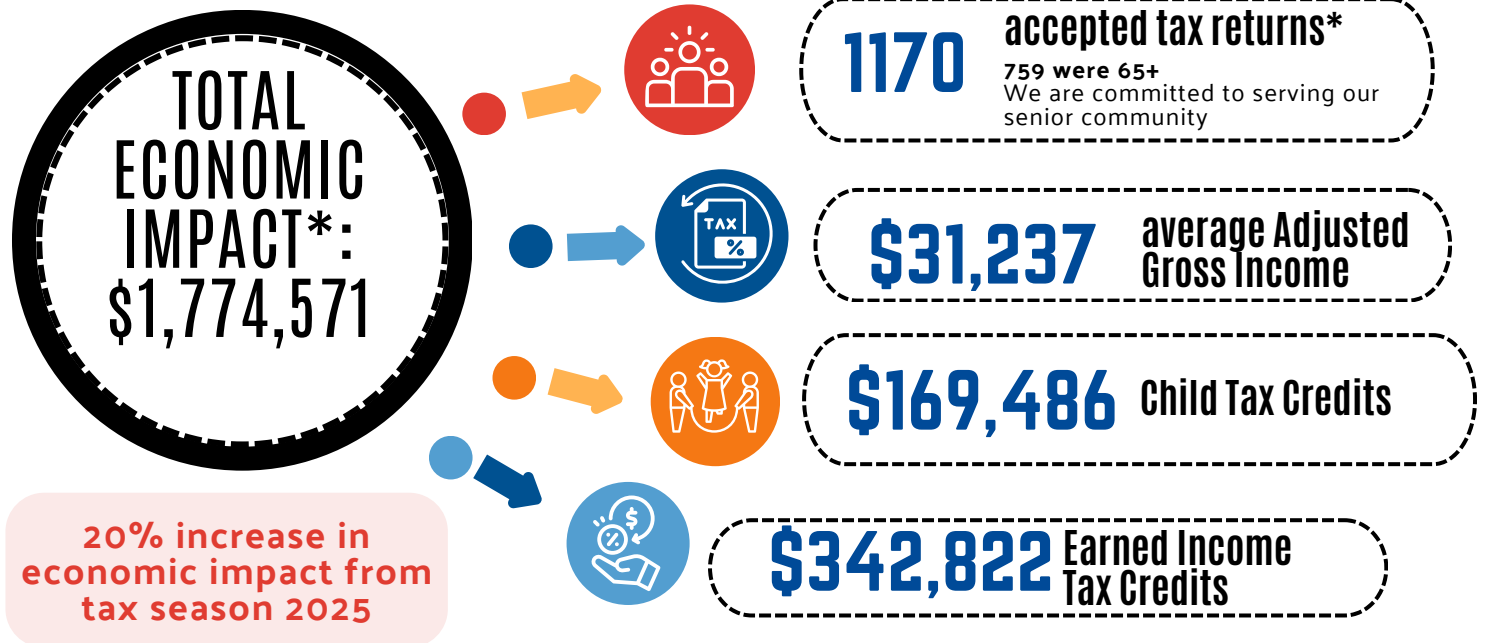




## Tax Season 2026 (Tax Year 2025)

The United Way Charlotte County's Volunteer Income Tax Assistance (VITA) program is an indispensable lifeline, extending far beyond free tax preparation to address Charlotte County's diverse and often profound needs.



\*Economic impact includes taxpayer savings, total refunds, and financial equivalent of volunteer hours.  
\*\* Includes paper filed returns.

Our dedicated volunteers provide expert tax preparation while supporting clients facing the financial pressures of rising costs for housing, food, utilities, and healthcare. While **65% of our clients are over age 65** and often living on fixed incomes, VITA also helps working families access valuable tax credits, including the Earned Income Tax Credit (EITC) and Child Tax Credit (CTC), helping them keep more of what they have earned.

**VITA saves clients an average of \$300 in tax preparation fees**—funds that can help cover essential household expenses. This year, volunteers contributed approximately **2,800 hours of service**, providing not only expert tax preparation but also compassion and encouragement. Their dedication makes VITA more than a tax program; it is a source of financial stability and community support.



**UNITED we  
can help  
ALICE THRIVE!**

A survey was provided and 18% of respondents completed it. Here are some noteworthy highlights from clients.

- 46% of individuals use their refund to pay off debts.
- 54% opt to increase their savings with the refund.
- 14% needed community resources for assistance.
- 73% are returning clients from last tax season

## Success Target:

Increase EITC Returns

2026 Target: 135

Target Result: 146  
8% increase

## Estimated Tax Payer Savings

Total Savings: \$374,400

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 | 809 returns<br>10% increase | \$917,847<br>39% increase | \$227,828<br>8% increase  |
| Punta Gorda    | 318 returns<br>6% decrease  | \$384,765<br>28% increase | \$114,994<br>14% increase |

\*Excludes paper filed returns.

## United We Thrive: Harnessing the Power of Our Volunteers

34

volunteers recruited, trained, and deployed



2,800 hours

with taxes still being prepared year-round



\$97,559  
In-kind value



900+  
phone calls &  
211 partnership