



STATE OF CALIFORNIA
Franchise Tax Board

CalEITC & VITA Update

Helping Those in Need

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CalEITC Update

- CA Earned Income Tax Credit created in 2015
- Challenge: Reaching those with no filing requirement
- FTB Partners:
 - Internal Revenue Service
 - Golden State Opportunity
 - State Departments
 - Nonprofits
 - Voluntary Income Tax Assistance (VITA)

CalEITC Expands

- CalEITC expands in 2017, easier to qualify
- The results:
 - TY 2015: 385,000 credits allowed, \$200 M
 - TY 2016: 386,000 credits allowed, \$205 M
 - TY 2017: 1.3 M credits allowed, \$299 M

Building Awareness

- Coordinated outreach aims to build trust
- FTB: brochures, media outreach, e-Bus
- Partners host events, canvass neighborhoods
- Golden State Opportunity hosts CalEITC4Me.org
- Board Members spread awareness

VITA Provides Key Support

- Connects recipients with the credit
- 1-on-1 help makes a difference
- Community trusts friendly VITA preparers
- Preparers versed in EITC and CalEITC
- Highly trained and IRS-certified volunteers

VITA Efforts at FTB

- Coordinated recruiting
- Marketing Materials
- Training
- Volunteer support via FTB's VITA hotline
- Multiple languages

VITA Results in Sacramento Area

- 3,900 returns prepared by FTB
- 18,000 returns prepared by coalition
- Nearly 20% of State returns claimed CalEITC
- \$450,000 worth of CalEITC for local community

The Real Impact of CalEITC

- Single mom goes to VITA event in Santa Rosa
- Works part-time, goes to college
- Received \$2,600 in Federal EITC, \$800 in State EITC
- Planned to use money to help her kids

Questions?