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?