

GETTING STARTED

It's easy for credit unions to get involved with the Free Tax Preparation Assistance program. Just fill out and return to The League the sign-up form on the Free Tax Preparation Assistance homepage that indicates your preferences. Please indicate:

Where you'll volunteer

First you need to decide whether to:

Tax preparation sites determine the need for staffing and on-site assistance from local partners. While credit unions are encouraged to volunteer, assignments are made on an as-needed basis and cannot be guaranteed. However, The League will facilitate communication to alert local sites to your interest and availability.

Send volunteers to a site

Notify The League about your participation. Then send volunteers from your credit union to a Free Tax Preparation Assistance site in your community (we can help identify one nearby) to assist with filing, open deposit accounts, provide information about credit union membership and/or educate filers on matters of personal finance.

Bring volunteers in-house

Designate a time when volunteers (whether or not they are from your credit union) will assist filers at your main or a branch office. You could designate regular hours from January through April 15 or participate only on select days, such as "Super Saturdays" which can be promoted locally.

How you'll volunteer

Next, you need to decide in what capacity people from your credit union will volunteer. For example, you might:

Be a greeter

Greeters welcome filers as they arrive and ensure they have brought the paperwork necessary for filing. Greeters also play a role in directing filers to credit union volunteers opening accounts and/or assisting with the completion of tax forms. Site coordinators will provide instruction to fulfill this role.

Open deposit accounts for filers

Credit unions help filers the most by facilitating fast, free tax refunds via direct deposit into credit union accounts. Site coordinators have a list of institution routing numbers to arrange for direct deposit (also found on The League's Free Tax Preparation Assistance homepage).

Assist with preparation of tax forms

The Department of Revenue and IRS also urge credit unions to assist filers directly with tax preparation – in addition to having someone open accounts – to achieve more face time with filers. By doing so, you maximize opportunity to explain asset-building strategies, credit union membership and more. However, you'll be required to complete an online self-study course (the IRS' "Link & Learn" – basic and intermediate program. This takes about 1-3 hours to complete.) You'll also want to arrange for a walk-through of the specific tax preparation software you'll be using. Visit The League's Free Tax Preparation Assistance homepage for a link to the online course and dates/locations of the IRS' software demonstrations (site coordinators may offer additional opportunities for this).

Free Tax Preparation Assistance Schedule

Credit unions can join the effort any time, but most activity will occur during the following time frames:

- **May – October** – League encourages credit union involvement. Credit unions return sign-up forms (see Free Tax Preparation Assistance Homepage)
- **December** – Credit unions receive training (if applicable) and receive assignments from site coordinators
- **January – April 15** – Free Tax Preparation Assistance sites open, tax filers assisted by credit unions!

Refrain from "selling" at Free Tax Preparation Assistance sites

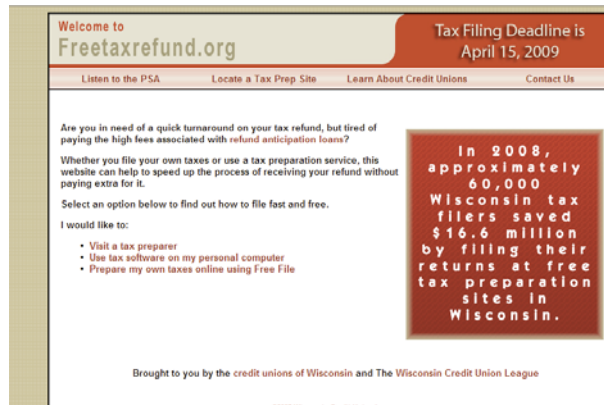
While it can be helpful for filers to understand what membership entails if they have opened a credit union account, do not "sell" filers on specific credit union products or services, including lower-cost loans you may offer. IRS rules prohibit solicitation at Free Tax Preparation Assistance sites.

Wanted: Office Supplies

Sites are always in need of basic office supplies like computers, copiers, paper and other items. Contact The League to get in touch with your local Free Tax Preparation Assistance site coordinator, who can identify specific needs.

Promote the website!

Urge your members to visit www.freetaxrefund.org. Contact info@theleague.coop for a free graphic that can link to the site.



For more information, contact:

Jim Drogue, VP – Credit Union Development
(800) 242-0833, Ext. 6005 or jdrogue@theleague.coop.

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GUIDE

2010

To a Successful Partnership with the Free Tax Preparation Assistance Program

A partnership of Wisconsin credit unions, the Wisconsin Department of Revenue, the Internal Revenue Service, AARP, and volunteers across Wisconsin.

Steps to Success To Help Tax Filers Avoid Predatory Loans



Resource Checklist

Visit The League's Free Tax Preparation Assistance homepage – www.theleague.coop/freetaxprep - for any of the items listed below, as well as a list of participants in the effort, timely updates, etc.

Before and during tax season

Use the following:

- Free Tax Preparation Assistance Listserv – email network exclusive to The League and participating credit unions
- Sample press release
- Sample newsletter/web article
- Sample Public Service Announcement (PSA)

On-site

Use the following:

- Signage directing filers to credit union volunteers
- Sample consent form - take pictures for your publications, media and The League
- Tracking form - count the number of accounts opened, number of filers assisted, etc.

Provide to filers

- Handout – Want a fast, free tax refund? (also provide to site volunteers)
- REAL Solutions® folder – provide to filers to hold their paperwork
- Your credit union's "new member"/welcome packet
- Asset building information from www.access.wisconsin.gov

After tax season

- Sample press release (touting results)
- Sample newsletter/web article (touting results)
- REAL Solutions® video/brochure – explains the value of the Free Tax Preparation Assistance effort

Visit the Free Tax Preparation Assistance Homepage

The League's Free Tax Preparation Assistance homepage offers information on training, communication materials, the list of credit union participants and sites statewide, and much more to guide your involvement. Check it out at www.theleague.coop/freetaxprep

Steps to Success

Review these tips to make the most of your involvement with the Free Tax Preparation Assistance program:

1

Cultivate leadership. Ask an emerging leader at your credit union to lead your involvement with tax preparation as a way of developing his or her leadership skills. Consider your own staff, directors or even members as a potential base of volunteers, and ensure they receive training, depending on their role (see "Getting Started" panel).

2

Use the Free Tax Preparation Assistance Listserv and other League resources. Join a listserv that allows you to communicate questions or ideas via email prior to and throughout tax season. You'll find this and other resources at The League's Free Tax Preparation Assistance homepage – www.theleague.coop/freetaxprep. Also, stay in touch with the liaison assigned to you by The League. He or she wants to guide you through the process.

3

Notify members. Make sure your existing members are making good use of their deposit accounts to get a fast, free tax refund. Use The League's sample newsletter article to give them the details.

4

Promote your involvement. Send local radio stations The League's Public Service Announcement (PSA) to let people in your community know when and where credit unions are assisting tax filers. Send newspapers The League's sample press release.

5

Verify identities and membership eligibility. Be sure to follow the proper procedures to verify filers' identities and open accounts only for individuals who are eligible for membership at your credit union, according to the terms of your bylaws.

6

Track and report your success. Record the number of new accounts you open and number of filers you assist so those results can be shared with The League, your members, lawmakers and media. Visit The League's Free Tax Preparation Assistance homepage for a data tracking/reporting spreadsheet. Send your completed sheet(s) to Chad Helminak at chelminak@theleague.coop so we can share our success with media, lawmakers and others.

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Get noticed. Make sure everyone involved at a Free Tax Preparation Assistance site understands your credit union's role. The League has developed a handout that explains how filers can benefit from credit union assistance. Provide this piece to greeters and other site volunteers so they understand the help you are providing and can help direct filers to you. Print the handout from the Free Tax Preparation Assistance Homepage.

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Pay attention to process. On site, make sure filers are directed to a credit union representative or someone sharing credit union-related information *before filing* to ensure they get an account opened for direct deposit. Preferably, discuss the room layout and procedures with a site coordinator *before* the site is up and running. You may also wish to prepare signage that helps filers locate you.

9

Share information. Be sure every person who opens (or has) a deposit account with a credit union understands that he or she is a credit union member and what that membership entails. You might provide each filer with your usual kit of "new member" information and explain that face to face. Share how the services your credit union provides can help filers reduce debt, improve their creditworthiness and build wealth.

10

Provide REAL Solutions® materials. Provide each filer you assist a free custom-printed folder (provided by The League) to hold the filer's paperwork. This should be used *only* by credit union volunteers since they identify the assistance being provided as part of Wisconsin credit unions' REAL Solutions® initiative.

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Take pictures. You can enhance media interest in your effort by providing photos of your volunteers assisting filers (or inviting a news photographer to take photos on site, if that is approved by your site coordinator). If you show filers' faces in the photographs, ask them to sign a consent form (see The Free Tax Preparation Assistance homepage). The League also needs your photos for use in our publicity and advocacy materials. Send them to Chris Henzig at chenzig@theleague.coop.

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Tout your results. Use The League's sample newsletter article and press release to share your successes with members and media. The League will also publicize Wisconsin credit unions' success, but media will want the local angle with local people quoted.

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Get recognized. Visit The League's Free Tax Preparation Assistance homepage for opportunities to be recognized with prestigious state and national level awards for your efforts.

14

Recruit another credit union. We'll be more successful fighting predatory lenders as additional credit unions get behind the effort.

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Conduct advocacy. Use The League's REAL Solutions® brochure and video – which in part explains the Free Tax Preparation Assistance effort – to build pro-credit union allies in your community, with media and in government. The brochure can be customized to tell your credit union's story. And, join The League's Activist program to learn how you can communicate the "credit union difference" to protect and defend the movement as part of Wisconsin credit unions' ongoing "1 with The League" public relations and advocacy program.