



Free File, the Intuit Tax Freedom Project, and Intuit Philanthropy

FTA 2010 E-Filing Symposium

May 2-5, 2010 - Atlanta, GA



1

Intuit Philanthropy -- The Big Picture

our values

Integrity Without Compromise

Delight Customers

It's the People

Innovate and Improve

Own the Outcome

We Care and Give Back

Employee Engagement

Volunteerism, Grants, Donation Matching

Share the best of Intuit and ourselves to make a difference in our global communities.

Corporate Engagement

Product Donations, Funding, Program Initiatives

Promote financial literacy and independence among those populations who would most benefit from the assistance, especially lower income and underserved individuals, taxpayers and small businesses.

2

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Intuit Financial Freedom Foundation

Corporate Engagement

Product Donations, Funding, Program Initiatives



From the makers of TurboTax



- Free TurboTax via FFA; more than 13 million fed and state returns donated since 1998.
- Partnerships with VITA, EITC campaigns
- Public Awareness events with CCIA
- Campaign with California First Lady Maria Shriver to increase awareness, uptake on federal tax credits, including EITC, CTC, etc.
- Includes online benefit calculator – WEB Connector – based on TT technology
- We Connect campaign tools available to *all* states; 12 states engaged
- Donations of current year QuickBooks, Quicken, etc. to 501c 3 organizations engaged in financial literacy, tax assistance, work force development, small business development.

3

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Intuit Tax Freedom Project

- Started in 1998; more than 13m federal/state returns donated
- Public Awareness events with CCIA
- Partnerships with VITA; provides unique opportunity for FFA growth, increasing VITA capacity to serve more people
 - Louisville, KY
 - Harlem, NY
 - Tucson, AZ
 - Providence, RI
 - New partnerships in TY'09: Buffalo, NY; Little Rock, AR
- #1 volunteer opportunity for Intuit WCGB volunteers in California and Tucson.

4

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Free Tax Assistance in your neighborhood.



From now until April 15, 2008, visit Food Bank for New York City/FoodChange to prepare and file your taxes for free.

284 St. Nicholas Avenue (between 124th and 125th Streets)
Open 9AM to 7PM Monday - Thursday & 9AM to 5PM Friday - Saturday*
Closed Mondays and Fridays in March
Spanish translation provided. *Hours subject to change.

It's Easy, Quick and Free!

If you can use a computer keyboard and a mouse, you can use TurboTax.

You qualify to file your Federal and New York State returns for FREE if ONE of the following applies to you:

- Last year's income was \$30,000 or less; or
- Last year's income was \$30,000 or less and you can claim the Earned Income Tax Credit

Not sure? Trained volunteers will be on site to help. Stop in.

Visit www.taxfreedom.com to prepare your taxes for free.



Intuit is a proud member of the IRS and New York Free File Alliance.



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Don't Want To Wait?

- Are you comfortable using a computer and a mouse?
- Do you have an email account?
- Did you earn \$30,000 or less last year?
- Do you believe your tax situation is pretty simple?

If you answered "Yes!", you may be eligible to use our FREE, self tax preparation software! Don't worry, our staff is available to help you!

Check in the back room to see if you qualify and avoid the wait!



Food Bank for New York City/FoodChange is an IRS approved 501(c)(3) org.
TurboTax Freedom Edition is available through the IRS and New York Free File Alliance.
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The last word ... from one taxpayer



Taxpayer in San Diego told us through a translator that normally she would go to tax preparers who made her feel bad, and stupid ... she used to leave feeling "cold".

She said with us, she felt so welcomed and we were all so helpful, that she felt "enchanted" and "warm".

Many others couldn't stop saying thank you...

7

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From the makers of



TY	Offer	Eligibility Criteria	Availability
TY98	Fed & State	\$20,000 AGI or less	Automatically given to taxpayers using TTW
TY99	Fed & State	\$20,000 AGI or less or 1040EZ	Automatically given to taxpayers using TTW
TY00	Fed & State	\$25,000 AGI or less + 1040EZ	ITFP Promoted on TT.com.
TY01	Fed & State	\$25,000 AGI or less	ITFP Promoted on TT.com.
TY02	Fed & State	\$27,000 AGI or less or EITC	FFA and ITFP promoted on TT.com.
TY03	Fed only (sep. State site)	EITC or < 22 years or ≥ 62 years or Active Duty Military	FFA only
TY04	Fed only (sep. State site)	Free For All	FFA only
TY05	Fed only (sep. State site)	\$28,500 AGI or less + EITC + Active Duty Military <i>Changed to:</i> Resident of select states & \$50,000 AGI or less (TaxACT) <i>Changed to:</i> Age 50 and younger & \$50,000 AGI or less (Block)	FFA only
TY06	Fed & State	\$28,500 AGI or less or EITC or Active Duty Military up to \$52k AGI	FFA only
TY07	Fed & State	\$30,000 AGI or less or EITC or Active Duty Military up to \$54k AGI	FFA only
TY08	Fed & State	\$30,000 AGI or less or EITC or Active Duty Military up to \$56k AGI	FFA only
TY09	Fed & State	\$31,000 AGI or less or EITC or Active Duty Military up to \$57k AGI	FFA only

FFA YEARS

8

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FFA / Intuit Volume

	Total FFA	Intuit	% of total
TY'09	2,726,301	1,129,767	41%
TY'08	3,011,957	1,099,055	36%
TY'07	4,774,894	1,615,981	34%
TY '06	3,854,157	1,268,859	33%
TY '05	3,875,148	1,189,381	31%
TY '04	5,142,118	2,235,438	43%
TY '03	3,510,359	729,603	21%
TY '02	2,790,000	1,256,971	45%
TOTAL	29,684,934	10,525,055	

As of 4/19/10

www.weconnect.net

English Spanish

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WEb Connector

You May Be Eligible to Put Up To \$5,657 Back In Your Pocket!
 Just visit our online WEb Connector tool, answer a few simple questions and find out if you may be eligible for the Federal Earned Income Tax Credit (EITC) or one of these other programs and resources:

- Federal Child Tax Credit (CTC)
- Federal Child and Dependent Care Expenses Credit
- Supplemental Nutrition Assistance Program (SNAP)
- Women, Infants and Children Program (WIC)

Select Your State

Click Here to Start the WEb Connector

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WeConnect you Money, Opportunity & Dreams

WE Believe in you. WE Care about you. Let us connect you to money, opportunity and dreams.

— Maria Shriver
First Lady of California

oneeapp
One-Step Access to Apply for Assistance
To apply to these and other programs, go to **One-e-app**.

Web Connector English | Español

Get Help Saving Money

Find savings for your groceries, utilities, insurance, taxes, and more—for free!

- Answer a few quick questions about you and your household.
- Web Connector will tell you which savings may be for you.
- The information you enter is confidential and is not saved. It is used to prepare the estimates only.

[Start Saving Now](#)

Program/Credit	Brief Description
Federal Earned Income Tax Credit (EITC)	Annual tax benefit if you work full or part time and earn below a certain income level
Federal Child Tax Credit	Annual tax benefit if you have qualifying dependents
California Child and Dependent Care Expenses Credit	Annual tax benefit if you paid someone in California for child or dependent care
Golden State Advantage Card	Get help to buy your monthly groceries.
Low Cost Gas and Electric (CARE Program)	Receive a 20% discount on your monthly gas and energy bills
California LifeLine Telephone Program	Reduced monthly telephone bills for basic services
Low Cost Automobile Insurance Program	Pay reduced car insurance premiums year-round if you have a good driving record
Women, Infants & Children Program	Receive certain free healthy foods for pregnant women, infants and young children.
No Cost & Low Cost Health Insurance Programs	No cost and low cost health insurance programs for you and your family.

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- NOTICE:**
1. Two ways to get more information
 2. Spanish translation
 3. What happens when a section is complete

Powered by **intuit**

Web Connector English | Español

Federal Child Tax Credit

Find tax savings up to \$1,000 per child.

About You collapse

What is your **income tax filing status**? **1**

Head Of Household **2** **1**

How many people live in your house (including yourself)? **2**

How many **qualifying children** do you have? **0**

What was your 2009 **earned income**? **0**

Let's See If You Have Any More Income expand

Let's See If You Have Any Expenses expand

[Back](#) [Start Over](#) [Next](#)

Your Estimated Results

- Federal Earned Income Tax Credit (EITC) **3** [▶ \\$3,637.00](#)
- Federal Child Tax Credit [▶ To Be Determined](#)
- California Child and Dependent Care Expenses Credit [▶ To Be Determined](#)
- Golden State Advantage Card [▶ To Be Determined](#)
- Low Cost Gas and Electric (CARE Program) [▶ To Be Determined](#)
- California LifeLine Telephone Program [▶ To Be Determined](#)
- Low Cost Automobile Insurance Program [▶ To Be Determined](#)
- Women, Infants & Children Program [▶ To Be Determined](#)
- No Cost & Low Cost Health Insurance Programs [▶ To Be Determined](#)