

Make Taxes Easier

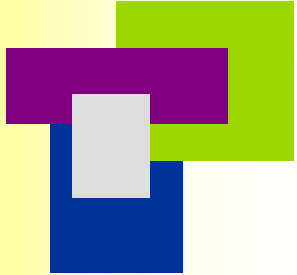
Stakeholder, Partnership, Education & Communication (SPEC):

- **Outreach & Education**
- **Free Tax Preparation**
- **Financial Literacy/Asset Building**



Limited English Proficient (LEP)

**Products,
Services and
Benefits**



LEP Hispanic Initiative

**Some of the products we provide
in Spanish include:**

Pub 3966, Living With Disabilities

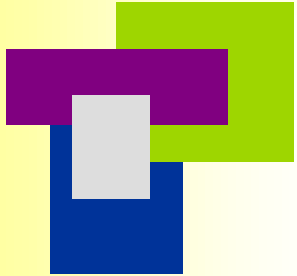
Pub 4128, Tax Impact of Job Loss

Pub 4141, Senior Citizens Retirement Info

**Pub 4156, Life Cycle Series: Birth Through
Childhood –**

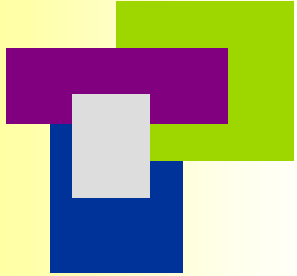
Pub 3524, EITC Eligibility Poster

Pub 3961, Child Tax Credit Stuffer



LEP Products

- **The products I just mentioned are distributed in various ways.**
 - Through our partners
 - Tax forums
 - Presentations
 - Mailings
 - Stuffers



LEP Services

- **In addition to our products, we offer many different services to our LEP clients.**
- **Some of our service include:**
 - Websites in Spanish**
 - Volunteer Income Tax Assistance**
 - On-Line Products**
 - Low Income Tax Clinics**



LEP Hispanic Initiative

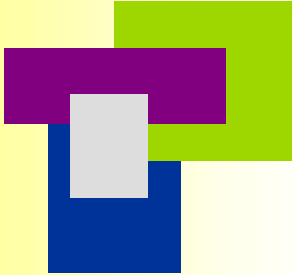
IRS en Español

The Spanish webpage at [IRS.gov](https://www.irs.gov). It provides tax information, forms publications & brochures that provide detailed tax information. The page offers interactive applications to assist taxpayers in determining eligibility for the Earned Income Tax Credit, calculating withholding, and others.



LEP Hispanic Initiative

The IRS and the [Taxpayer Advocate Service](#) (TAS) worked together to develop the [Tax Toolkit](#). TAS is an independent organization within the IRS whose employees assist taxpayers who are experiencing economic harm, who are seeking help in resolving tax problems that have not been resolved through normal channels, or who believe that an IRS system or procedure is not working as it should.



LEP Initiative

- **The online toolkit, both English and Spanish versions, is available 24 hours a day, seven days a week and makes it easier to:**
- **Understand basic tax information**
- **Determine if you need an Individual Taxpayer Identification Number (ITIN)**
- **Learn about special tax credits**
- **Help prevent identity theft**
- **Understand why it's important to follow the tax laws**
- **Learn more about the tax-related issues of starting a small business**
- **Understand your options when you owe the IRS money**
- **Get your tax refund quickly and fairly**

LEP Initiative

IRS - Tax Literacy Toolkit - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Address <http://www.tax-toolkit.com/> Go Links

TAXPAYER ADVOCATE SERVICE
YOUR VOICE AT THE IRS

Sitemap Español Print Contact Us

Welcome!

Tax Topics

Interactive Tax Help

Tax Videos

Frequently Asked Questions

Tax Problems

Links and Resources

Taxes: What You Need to Know

[CLICK HERE FOR AUDIO](#)

Information on Economic Stimulus Payments

Welcome to Taxes: What You Need to Know -- Responsibilities & Benefits! This toolkit is available to you 24 hours a day, seven days a week and makes it easier for you to:

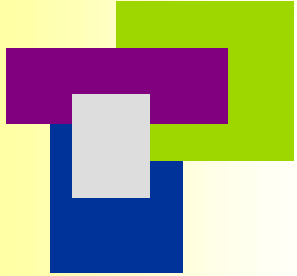
- Understand basic tax information
- Determine if you need an Individual Taxpayer Identification Number (ITIN)
- Learn about special tax credits
- Help prevent identity theft
- Understand why it's important to follow the tax laws
- Learn more about the tax end of starting a small business
- Understand your options when you owe the IRS money
- Get your tax refund quickly and fairly

Filing and paying your federal taxes the right way is an important part of living and working in the United States. Understanding the way taxes work, and the role of the Internal Revenue Service (IRS), can make it easier to get, and stay, out of tax trouble.

The IRS and the [Taxpayer Advocate Service \(TAS\)](#) worked together to develop this toolkit. TAS is an independent organization within the IRS whose employees assist taxpayers who are experiencing economic harm, who are seeking help in resolving tax problems that have not been resolved through normal channels, or who believe that an IRS system or procedure is not working as it should.

For information on specific topics, click the links on the left.

Start | Inbox - Microsoft Outlook | Non-English Outreach - ... | Microsoft PowerPoint - [L... | IRS - Tax Literacy Too... | 11:38 AM



LEP Services

- **There are over 200 Sites throughout WI that provide Free Tax preparation**
- **All our sites provide Electronic Filing**
- **Direct Deposit**
- **Split Refunds**
- **Some sites have Bank Representation and are able to open accounts at the site.**



LEP Hispanic Initiative

The Multilingual Initiative (MLI) Strategy Office and SB/SE are pleased to announce the launching of a twelve-month pilot to provide language interpreter services, through the use of the Over-the-Phone Interpreter (OPI) service. The OPI service will allow frontline employees to effectively communicate with our limited-English proficient taxpayers in over 170 languages and assist them in meeting their tax responsibilities.



LEP Hispanic Initiative

New Online Products

“Basic Tax Responsibilities” are educational audio CDs covering basic tax responsibilities.

A DVD entitled “Novela de los Impuestos Federales”, is included, which realistically portrays an immigrant’s journey to understand his responsibility.

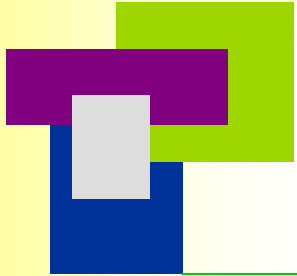
**Spanish Practitioner Toolkit- Publication 4445
Opening the Door to the Spanish-speaking Customer - Publication 4636**



LEP Hispanic Initiative

Identify Available Services - Toll-Free Telephone Assistance is available in Spanish on pre-recorded hotlines and from bilingual IRS representatives:

- **The TeleTax line (800-829-4477) has recorded messages in Spanish that are available around the clock, covering more than 100 tax topics.**
- **The Refund Hotline (800-829-1954) provides information about a refund status in Spanish when caller provides the filing status and the exact refund amount expected.**
- **The IRS toll-free customer service line (800-829-1040).**



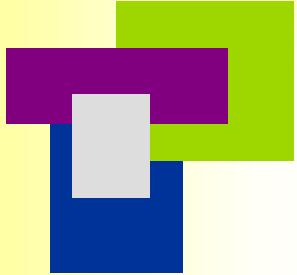
LEP Hispanic Initiative

Low Income Taxpayer Clinic (LITCs)

LITCs represent low income taxpayers before the IRS, in audits, appeals and collections disputes. In addition they can help taxpayers respond to IRS notices.

LITCs also provide education or consultation to taxpayers who cannot afford professional tax assistance.

IRS Publication 4134 provides a listing of LITCs in states across the nation



LEP Hispanic Initiative

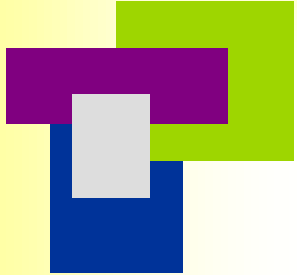
Individual Taxpayer Identification Numbers (ITINs)

An ITIN does

- **Allow taxpayers that do not have social security numbers to meet their filing requirements**
- **Allow for a return to be filed electronically**
- **Allow the recipient to claim the Child Tax Credit, if eligible**

An ITIN does not

- **Entitle the recipient to claim Earned Income Tax Credit (EITC)**
- **Change the individual's immigration status**
- **Give the individual the right to work in the U.S.**
- **Serve as identification outside the tax system**
- **Entitle the recipient to Social Security benefits**



LEP Benefits

Inform taxpayers of the benefits of filing a federal income tax return and paying taxes

- When taxpayers file tax returns and pay taxes owed, they are complying with the law, benefiting the community and themselves.**
- Filed tax returns may assist taxpayers with establishing the length of time they resided in the United States.**
- Financial institutions may require copies of federal tax returns in transacting purchases of property, automobiles or real estate.**
- Credits may result in a refund and additional income for the taxpayer**



LEP Hispanic Initiative

ITIN Resources

References/Sources for additional information on ITIN and paying taxes can be found at:

- **Publication/Publicación 4346 (Eng/Sp) Why Should I pay Taxes? ¿Por qué debo pagar impuestos?**
- **Publication/ Publicación 579(SP) How to prepare the Federal Income Tax Return / Cómo preparar la Declaración de Impuesto Federal**
- **You can access these publications by visiting the IRS Web site**
- **Publication/Publicación 4327 (Eng/Sp) ITIN (Individual Taxpayer Identification Number / Número de Identificación Personal del Contribuyente)**



LEP Hispanic Initiative

Latino Community-Based Organizations (CBOs)

“Latino CBOs offer an opportunity for the private sector as well as federal, state, and local government agencies to collaborate with trusted groups that reside in the communities they serve, that understand the cultural behaviors or residents, and that can provide on-the-ground information concerning policy implementation and effectiveness.” Latino CBOs have features that help facilitate cooperation between mainstream institutions and the Latino (Hispanic) communities they serve.



LEP Hispanic Initiative

Latino CBO features include:

- **Bicultural and bilingual content and responsiveness in service and outreach programs.**
- **Trust reciprocity and cultivation of community presence through reliable services and information sharing.**
- **Inclusion of Latino families in meetings and discussions with governmental officials and agents in community settings to minimize the degree of intimidation and to humanize the bureaucratic process.**
- **Programs and outreach efforts designed to promote a community-based ownership perspective.**

(Source: Asset Accumulation and Economic Development in Latino Communities: A National and Border Economy Profile of Latino Families, Barbara J. Robles, PhD, Arizona State University.)



LEP Hispanic Initiative

Marketing Channels

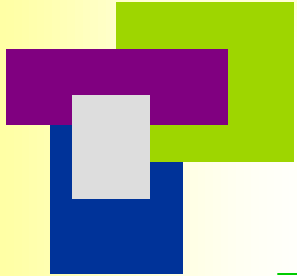
- **Current partners** – Ask if they have a Hispanic Initiative or programs
- **Partner referrals** – Ask current partners whether they can refer you to other potential partners, or make an introduction to Hispanic programs.
- **Research local organizations** and identify any community-based organizations that are familiar with the needs of the Hispanic population.
- **Tax Preparers** - Research studies have shown Hispanic taxpayers rely heavily on tax practitioners for tax return preparation. Most Hispanic LEP taxpayers have gone to the same tax preparer for years, one who was originally recommended by word of mouth from family, friends or co-workers. Outreach and education materials can be leveraged through local preparers.



LEP Outreach

Media

- **The media has a high penetration in the Hispanic community because they take advantage of the rich, oral and audiovisual tradition of the Hispanic culture.**
- **They also offer direct impact and a personal approach, which are extremely important in the Hispanic culture.**
- **Radio and television are highly effective, particularly among Hispanics with low literacy skills and those who work in the services industry and are able to listen to the radio or watch television at work.**



LEP Outreach

- **Posting signs in intake areas and other entry points.**
- **Stating in outreach documents (brochures, booklets, outreach and recruitment information) in appropriate languages that language services are available.**
- **Working with community-based organizations to inform LEP persons of the language assistance available.**
- **Including notices in local newspapers in languages other than English.**
- **Providing notices in non-English language radio and television stations about the availability of language assistance services.**
- **Presentations and/or notices at school and religious organizations**



LEP Hispanic Initiative

National SPEC Partners with Efforts that Focus on LEP Communities

- **America Saves- Hispanic Saves** – This partner focus on the needs of the Hispanic population, Hispanic Saves. It is a nationwide campaign in which a broad coalition of nonprofits, corporations, and government organizations help individuals and families save and build wealth.
- **Bank of America** –sponsoring VITA sites in approximately 30 cities. Many of the sites will be serving predominately LEP Hispanic clients.
- **Center on Budget and Policy Priorities (CBPP)** – IRS/SPEC partners with CBPP to provide the latest updates and changes in tax law impacting the low-middle income families.
- **Federal Deposit Insurance Corporation (FDIC)** – FDIC developed and implemented the Money Smart financial education product. It has reached over 360,000 students over the past 3 years, a significant percentage of whom are LEP.