



UNIVERSITY OF GEORGIA

VITA IMPACT REPORT

SPRING 2022



University of Georgia
Volunteer Income Tax
Assistance

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MEET THE UGA VITA TEAM

Without the hard work and dedication of UGA's VITA Team, this year's program would not have been possible. Thank you for your commitment to serve the Athens community and the state of Georgia!



Dr. Lance Palmer
Professor



Dr. Joan Koonce
*Professor & Extension
Financial Planning
Specialist*



Faith Rasmussen
Program Coordinator



Wil Golden
*Assistant Program
Coordinator*



Aubrey Richardson
Site Coordinator



Andrew Todd
Site Coordinator



Jeannie Heerlein
Site Coordinator



Caroline Smith
Site Coordinator

GEORGIA UNITED CREDIT UNION

Without Georgia United Credit Union, UGA VITA would not be able to serve so many people in the Athens area. We are grateful for Georgia United Credit Union's enduring partnership and their employees' continuous support. Many thanks to each of you!

Quick Stats



33 students & 9 student managers



775 clients served



"Giving back to the Athens community also was a huge benefit for me. The city and its residents do so much for us as a university and VITA provided a great opportunity to give back. Athens has struggled following the pandemic, and the elimination of preparation fees through this program has large economic benefits for individual residents. Each week we could see the good we were doing in the area and this made me proud to be a member of both the UGA and Athens communities"

- Joseph Berman, Accounting



UGA VIRTUAL VITA

Virtual VITA is held at the Charles Schwab Financial Planning Center in the heart of UGA's South Campus. With the help of our Extension Agents, students prepared taxes for clients across Georgia, expanding UGA VITA's impact beyond Athens. Thank you to the students and agents for your hard work!



"One of the very last clients I serviced reached back out to her client to tell her how much she appreciated my help and the nice follow up letter I sent her. I was surprised to hear this because I was doing what I had done all year with every client, and nothing in this case felt unique. However, it made me realize how much the work I was doing meant to these people. Many of them were of lower income and it must have been very nice for them to receive this free, professional service. I am very glad I ended up taking this class and I hope the VITA program continues to grow larger in the future."

- Nick Fazzone, Accounting

Quick Stats



48 students & 9 student managers



750 clients served



UGA COOPERATIVE EXTENSION

Quick Stats



"For the first time, I had a client with a 1099-S from the sale of her deceased mother's house. The client was concerned the sale would cause her to owe taxes. With the help of Dr. Koonce we were able to complete the return correctly. Luckily, the money she paid out of pocket for a new HVAC system offset the gain of the home sale. My client did not end up owing money and in fact received a small refund. The client was so appreciative of the extra work and time put into her return. They couldn't believe it was a free service."

- **Christa Campbell, Elbert County**



"VITA has been one of the most rewarding outreach programs I offer to my local community and surrounding counties. I am passionate and dedicated to making a significant impact in my community to improve the economic and financial wellbeing of families. This service is especially needed in rural areas where there is an increased risk of poverty. VITA saves customers an average of about \$300 in tax preparation costs. I am grateful to have customers who find me friendly, trustworthy, and express their appreciation of my dedication for offering and continuing to offer tax preparation services at no cost."

- **Ida Jackson, Wilkes County**

"VITA is a unique opportunity to connect with clients in new ways, furthering the mission and reach of Extension in Lanier County. Clients come for tax assistance, but they often leave with steps to improve their credit, business plans, gardening resources, recipes to try, and possibly most meaningful of all: community. Beyond the refund dollars gained and fees saved, the connection shared and gratitude expressed by clients young and old, from all different walks of life, is truly priceless."

- **Dana Carney, Lanier County**



UGA VITA OVERVIEW



\$501,486

EITC claimed

\$93,981

Education credits
claimed

\$2,331,759

In refunds

\$4,400,639

Economic impact

\$602,000

Fees saved

1,505

Federal
returns filed

56

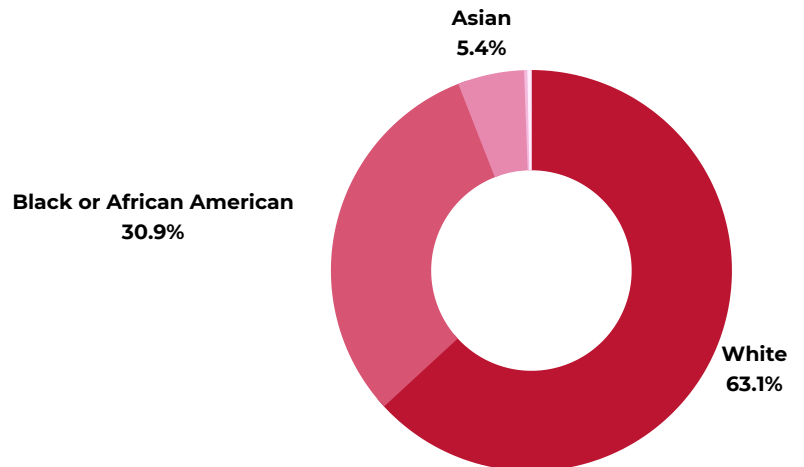
Split
refunds

345

Returns
claiming
EITC

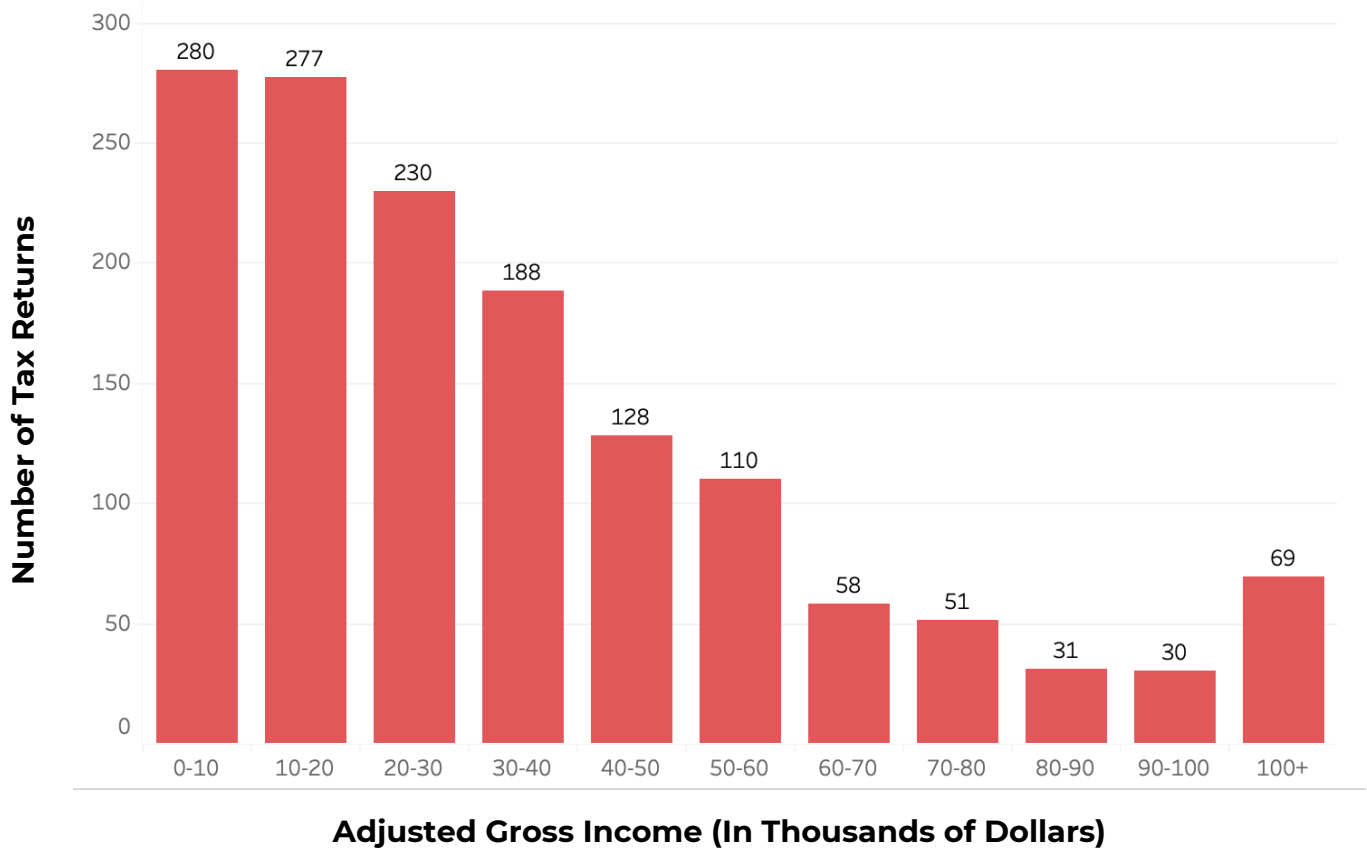
2022 CLIENT DEMOGRAPHICS

VITA Client Breakdown by Race



"By splitting my refund, I finally reached my savings goal of \$10,000. I've been striving for this cushion as I am preparing to find a new job. I'm glad VITA can help support and encourage people to plan for the things that typically blindsides us." - **Linnea Ionno, Client**

UGA VITA Client AGI Data

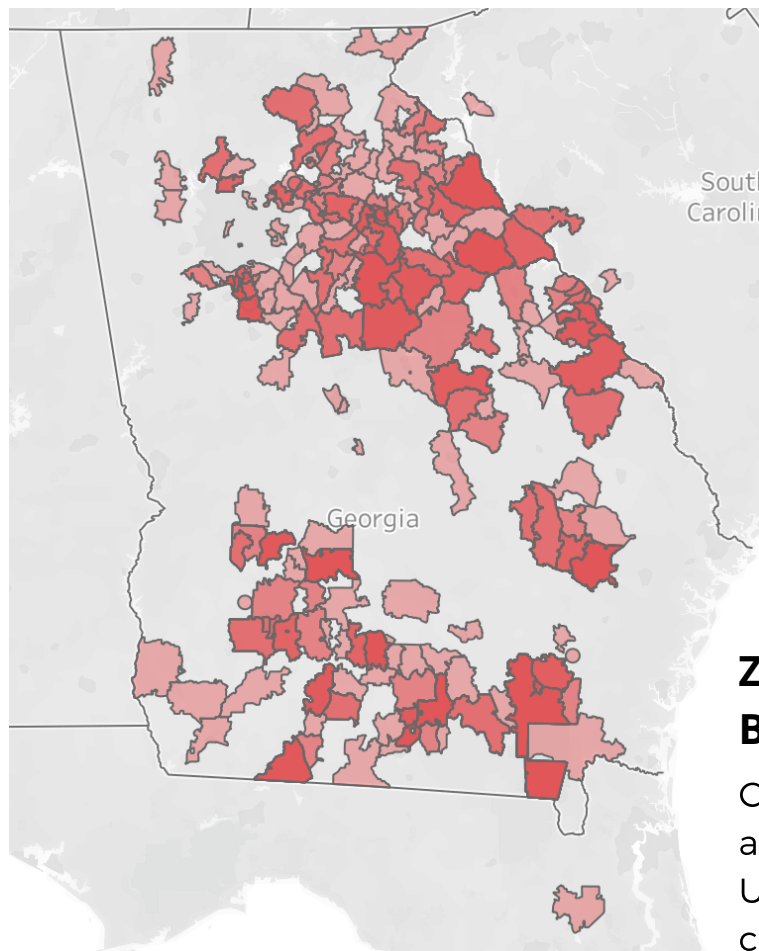


VITA GEOGRAPHIC OUTREACH

Throughout the tax season, UGA VITA's impact has spread throughout the state of Georgia and across the country. Combined, Georgia United Credit Union and Virtual VITA reached 103 cities in the state of Georgia. Beyond Georgia, UGA VITA has reached additional 10 states across the country.

States Reached By UGA VITA

California
Georgia
Florida
Louisiana
Maryland
New York
Tennessee
Texas
South Carolina
Virginia
Utah



Zip Codes Reached By UGA VITA

Combined Virtual VITA and Georgia United Credit Union served 91 out of 159 counties in Georgia.

THANK YOU TO OUR DONORS

Thank you to Georgia United Credit Union and donors for supporting UGA VITA. We are incredibly grateful for all that you do and your belief in the impact this program has on the state of Georgia. We look forward to working with you all in the future!



Scan the QR code to become a donor today! You can become a **1% Giving Club Member** or a **Corporate Partner** with UGA VITA. Thank you for your donations!





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For more information about UGA VITA, visit vita.uga.edu.

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