



UNIVERSITY OF GEORGIA
VOLUNTEER INCOME TAX
ASSISTANCE PROGRAM

UGA VITA IMPACT REPORT

SPRING 2023



University of Georgia
Volunteer Income Tax
Assistance

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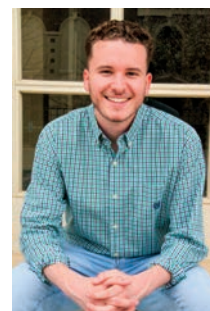


"I am grateful to be a part of something bigger than myself with such amazing people serving equally amazing people."

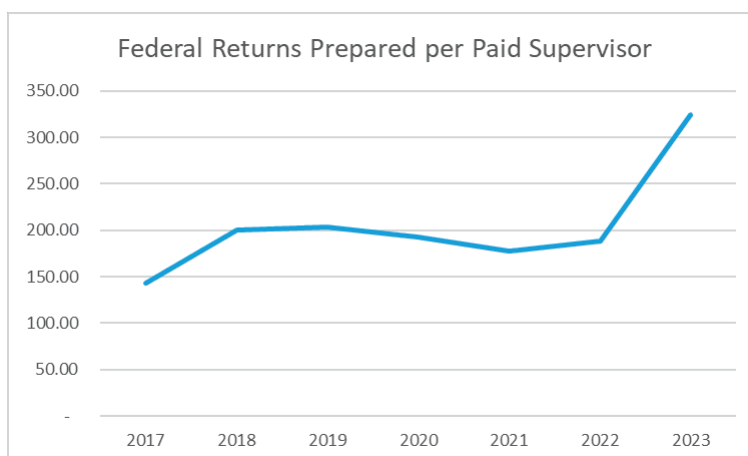
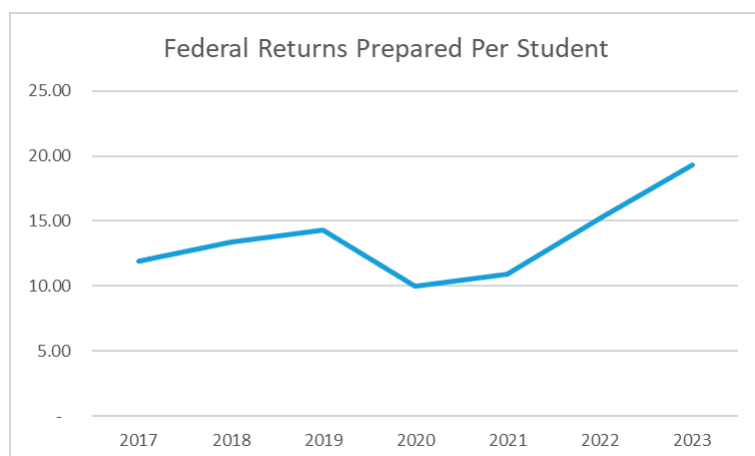
Natalie Odom, Financial Planning Student

"I truly believe that VITA is one of the best and most beneficial classes that the UGA financial planning curriculum has to offer. I say this because VITA genuinely did change my attitude about providing professional service. You can hear all day about the process of any job, but it is not until you work hands on that you will really see what all the job entails."

Colton Dixon, Financial Planning Student



UGA VITA RECORD EFFICIENCY



The 2023 tax season marked a pivotal point in UGA VITA's history.

UGA VITA became more efficient than ever before. Now UGA VITA services, in-person and virtual, are consolidated into one operating location at the Charles Schwab Financial Planning Center. These services are offered during the same time blocks under consolidated supervision. This change cut operating hours in half from 48 to 24 hours per week and eliminated weekend and late-night hours for students and staff. These changes propelled UGA VITA to set a new record for the number of returns prepared. This was achieved with the fewest preparers, managers, and staff in recent years. The charts above show the substantial increase in efficiency achieved by students and staff this tax season.

Congratulations on a record-setting season!

UGA VITA TEAM

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



Dr. Lance Palmer
Professor



Joan Koonce
Extension Agent Coordinator



Wil Golden
*UGA VITA Program
Manager*



Austin Rowland
Site Coordinator



Jessie Weaver
Site Coordinator



Yun Lin
Site Coordinator

UGA VITA SEASON

"Overall, the VITA tax-planning program has been a wonderful experience that I would recommend for anyone. It has challenges, adversity, and most of all a great team-friendly culture that helped me grow as a budding professional. It is the most immersive college course I have taken as an undergrad, and I would take it again in a heartbeat!"

JT Hammond, Accounting Student



UGA VITA is located in 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!

UGA VITA OVERVIEW



\$212,028

EITC claimed

\$126,826

Education credits
claimed

\$1,481,568

In refunds

\$3,178,752

Economic impact

\$647,600

Fees saved

1,619

Federal
returns filed

109

Split
refunds

154

Returns
claiming
EITC

"The joy of helping others for free, knowing that I am bringing a vital service to the community that needs the help, is gratifying in a way that paid work is not."

Andy Li, Financial Planning Student

UGA VITA STUDENTS

Quick Stats



66 Student Preparers

18 Student Managers

1619 Tax Returns
Prepared



"Something that this class gave me that other classes couldn't, was the satisfaction of being able to help people."

Abigail Evans,
Financial Planning Student



"Volunteering at VITA has also been something that I am excited to tell people about, even something that I have mentioned in conversations with current accountants, and it has given me so much more than experience, it has given me the confidence I needed to pursue my dreams."

Andressa Krahembuhl, Financial Planning Student



UGA VITA COOPERATIVE EXTENSION

Quick Stats



20 Extension agents

602

Agent-Facilitated
Tax Returns

"VITA is a unique opportunity within UGA Extension to support my community and clients in a tangible and immediately beneficial way. Personal connections made with clients open the door to an array of programs and educational opportunities provided through Extension. The VITA program is an ideal match for rural, low-wealth communities such as Burke County. Not only can clients trust that their returns are prepared correctly and professionally, they typically save around \$300 in tax preparation related fees. A newcomer to the community states, "As a first-time client with UGA VITA, my experience was outstanding to say the least. The customer service, thoughtfulness, and the pure knowledge of my agent were incredible. I will be utilizing and referring others to VITA for the next tax season"

- Terri Black - Burke County Extension Agent



"I was so pleased to bring the VITA program to Banks County and the surrounding communities this tax season. Extension's mission is to foster a healthier and more prosperous Georgia, and VITA is a key tool to help us achieve that mission in Banks County. Between the money clients save in tax preparation fees and the refunds they are able to claim, the economic impact of VITA measures in the tens of thousands of dollars, a significant impact in a small, rural community like ours. VITA also helps us market our other services to clients, ensuring that they have access to research-based, quality information about financial management (and other topics!) not just during tax season but year-round"

-Susie Burton Medina - Banks County Extension Agent



UGA VITA GEOGRAPHIC OUTREACH

Quick Stats

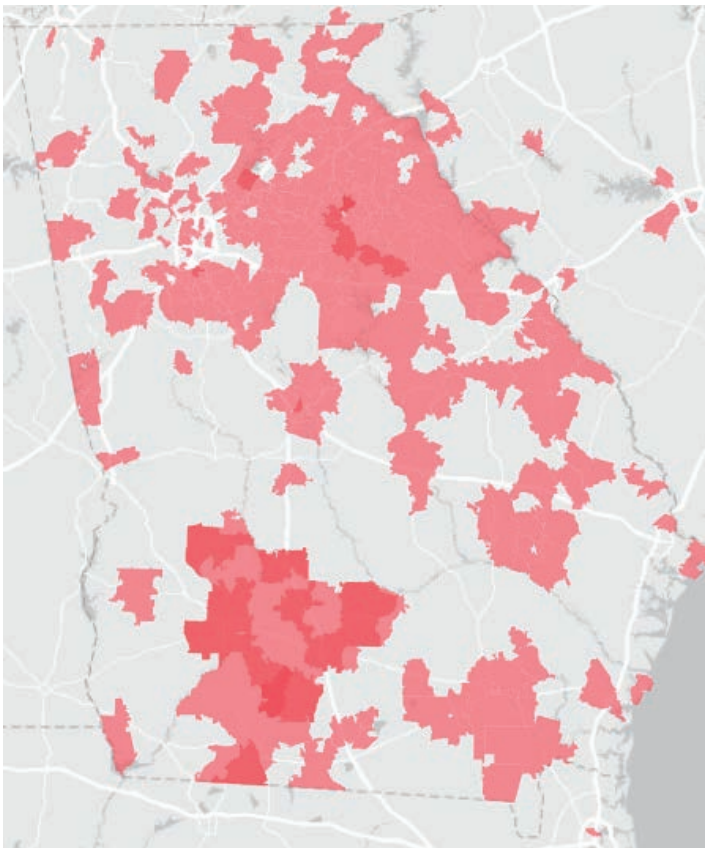
UGA VITA Reached



187 Georgia cities

94 Georgia counties

11 States



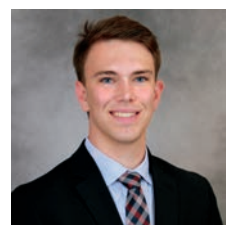
Zip Codes Reached By UGA VITA

States Reached By UGA VITA

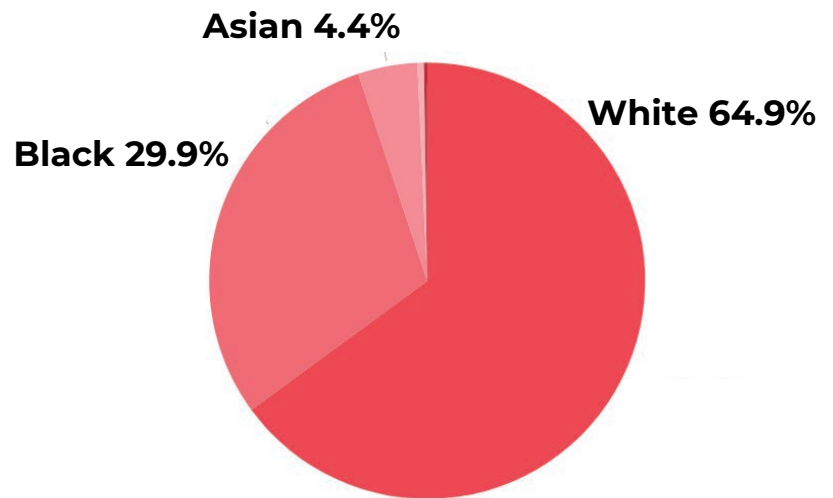
Arizona
California
Florida
Georgia
Kentucky
Massachusetts
New York
North Carolina
South Carolina
Tennessee
Utah
Virginia

"The impact we had on the community in Athens, and across Georgia, was an unforgettable aspect of the work we did. Overall, I am grateful to have been a part of such an incredible program, and could not thank those who make it possible enough."

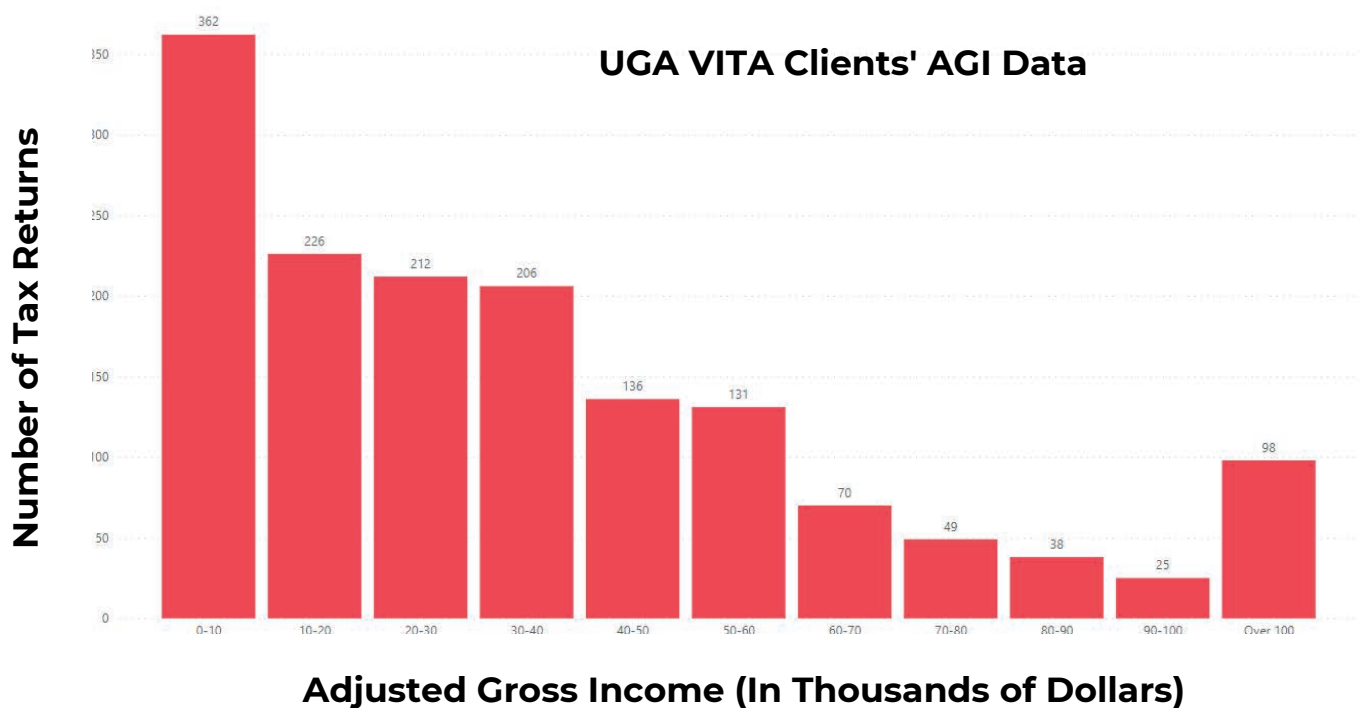
Josh Brumbach, Financial Planning Student



UGA VITA CLIENT DEMOGRAPHICS



UGA VITA Clients by Race



"The client-facing experience that I gained through VITA will undoubtedly be valuable in any future role that I undertake.

I learned the continued importance of providing professional services and ensuring that clients feel valued and supported throughout the entire process."

Christian Zahm, Financial Planning Student



UGA VITA PARTNERS

Thank you to our UGA VITA partners. We are grateful to partner with you. Our collaboration expands and deepens the reach of VITA services throughout our communities. Together, we are making a positive impact in the lives of the clients we serve. We look forward to the future with you.



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EXTENSION



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EST. DEVELOPMENT CORPORATION 1993

HCDC

HANCOCK COMMUNITY DEVELOPMENT CORPORATION



Clarke County
School District
Better Together

Scan the QR code
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become a **1% Giving Club Member**
or a UGA VITA **Corporate Partner**.
Thank you for your support!





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GEORGIA**
Volunteer Income Tax Assistance

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

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