

# IOWA STATE UNIVERSITY

## University Extension

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### Waukon's VITA Center fills *Horizons* identified need

Financial education and help with basic income tax returns were identified as needs during the *Horizons* program in Waukon. As part of the community action plan, five local volunteers received training and certification in the Internal Revenue Service's Volunteer Income Tax Assistance (VITA) and Tax Assistance for the Elderly (TCE) programs.

The Waukon VITA site opened for business one day a week in March 2008 and assisted 72 clients with free tax preparation and e-filing before the April 16 IRS tax deadline. Grant funding provided a computer, printer, and supplies, and the Iowa State University Extension office in Waukon donated office space and coordinated scheduling appointments.

The VITA and TCE programs help low-to-moderate-income families and individuals, including persons with disabilities, limited English proficiency, and elderly with free tax preparation and e-filing. Forty-seven senior citizens sought help to file the 1040A form required to receive the Stimulus Payment. At \$35 per filing, these Waukon senior citizens saved \$1645.

VITA Assistors provided electronic filing for 25 local residents. This included recovering \$7076 in Earned Income Credit, \$18,100 in federal refunds and \$2490 in state refunds. The free filing service saved each person an average of \$100, the amount they would have paid a tax preparation service.

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"I would like to say how pleased and grateful I am for the Free Tax Preparation Assistance and E-filing. I am a single mother and receive no assistance so this service was greatly appreciated. Last year I paid \$210 to have my taxes prepared and filed. This allowed me to keep a few extra dollars in my pocket to use on my child."  
*Colleen Tierney, Waukon*

"As a retired citizen, any way I can save money brings a smile to my face. I will be telling my family and friends about this great service!"  
*A very Happy Citizen, Shelby J. Mundt*

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In addition to VITA and TCE services, the Waukon *Horizons* financial education committee is also coordinating a beginning financial planning class ("Planning to Stay Ahead") held monthly at the ISU Extension office in Waukon.

The *Horizons* program helps communities build stronger leaders to address economic issues and find ways to implement change. Directed by Iowa State University Extension with funding from the Northwest Area Foundation, it targets small communities with more than 10% living at the poverty level.

*For more information, contact Ruth Freeman, Iowa Horizons Project Director (515-386-3611), Teresa Wiemerslage, Allamakee County Extension Education Director ([wiemer@iastate.edu](mailto:wiemer@iastate.edu)), or Brenda Schmitt, ISU Extension family resource management specialist (641-423-0844). For Extension efforts in Allamakee County, contact the Allamakee County Office, 563-568-6345 or [www.extension.iastate.edu/allamakee](http://www.extension.iastate.edu/allamakee)*

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