



National Women's Law Center Tax Credits Outreach Campaign

Toolkit for Advocates

2011 Tax Filing Season

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The National Women's Law Center is a nonprofit organization that has been working since 1972 to advance and protect women's legal rights. NWLC focuses on major policy areas of importance to women and their families, including family economic security, employment, education and health and reproductive rights, with special attention given to the needs of low-income women.

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Welcome to the 2011 Tax Credits Outreach Campaign

Each year we partner with advocates and community leaders across the country to conduct a public education campaign aimed at informing millions of families about state and federal tax benefits for which they may be eligible and how to find free tax preparation assistance. **This year, the tax credits available to low- and moderate-income families are more valuable than ever.**

These tax credits are available to all families who are eligible for them. **But families must file a tax return to claim them.** So, unless families are informed about the credits and how to claim them, they may miss out on thousands of dollars in valuable tax assistance.

We need your help to spread the word! As highly trusted community members who have regular contact with families, you have a unique opportunity to educate families about these benefits. Whether you e-mail materials to your networks, make fliers available to parents, post information on your website, or get the word out through the media, your efforts can make a difference in the lives of hard-working families.

Participating is easy. This Toolkit includes information on why tax credits matter, sample campaign activities, and resources available from the National Women's Law Center. The Toolkit also contains sample outreach materials as well as a campaign timeline. You can use these tips and tools to decide, based on your resources, which outreach activities work best for you.

You can help families put money back in their pockets by joining the 2011 National Women's Law Center's Tax Credits Outreach Campaign!

What Everyone Should Know

Federal tax credits—the **Child and Dependent Care Tax Credit**, **Child Tax Credit**, and **Earned Income Tax Credit**—and similar state tax credits can provide a significant boost to families. These credits can lower the income taxes that families must pay and, in some cases, give cash refunds to families whose incomes are too low to owe taxes.

Federal and state tax credits combined can be extremely valuable to families.

In New York, for example, eligible families can receive up to **\$2,100** from the federal Child and Dependent Care Tax Credit, **\$2,310** from the New York State Child and Dependent Care Tax Credit, **\$5,666** from the federal Earned Income Tax Credit, **\$1,700** from the New York Earned Income Tax Credit, **\$1,000** per child from the federal Child Tax Credit, and **\$330** per child from the Empire State Child Credit (based on the federal Child Tax Credit). And eligible families in New York City can also receive up to **\$1,733** from the New York City Child Care Tax Credit.

Changes to the federal tax laws in 2009 increased the value of the EITC for families with three or more children and married couples, increased the number of low-income families eligible to receive the CTC, and increased the value of the CTC for low-income families. In addition, the **Making Work Pay** credit, worth up to \$800 for couples, is available to eligible workers in 2010. For more information, please visit

www.nwlc.org/loweryourtaxes.

- The federal **Child and Dependent Care Tax Credit** is designed to offset some of the child and dependent care costs that families pay in order to work. This credit is worth up to **\$2,100**.
- The federal **Child Tax Credit** is designed to help families offset some of the costs of raising children. This credit is worth up to **\$1,000** per child. Even families who owe little or no income tax can receive at least some of this credit as a refund if they have at least \$3,000 in earnings.

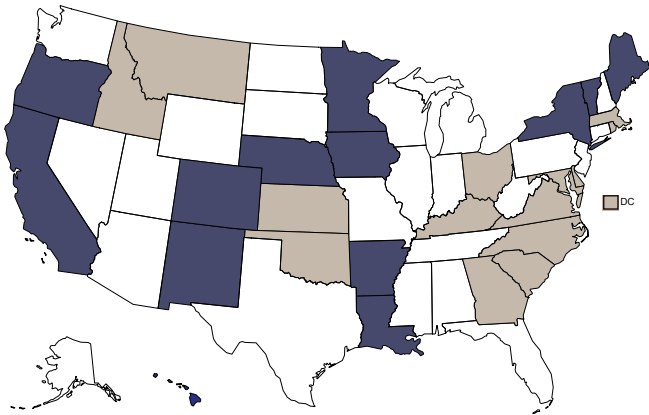
- The federal **Earned Income Tax Credit** is designed to boost the wages of eligible families (married couples earning less than \$48,362 or singles earning less than \$43,352). It is worth up to **\$5,666** and is available as a refund for families that owe little or no income tax.
- The federal **Making Work Pay Credit** is designed to increase the take-home pay of working families. Many workers will receive the benefits of their credit through a reduction in wage withholding in 2010, but some workers will receive some or all of their Making Work Pay Credit after they file their taxes in 2011. The credit is worth up to **\$800** and is refundable.

The credit values listed above are for the credits families can claim when they file their 2010 tax returns in early 2011, based on the families' income and expenses for 2010. In some cases, these credits are refundable, which means that even if a family does not earn enough to owe income taxes, the family may be able to receive a refund check!

State Tax Credits Can Make a Real Dollars & Cents Difference to Individuals & Families

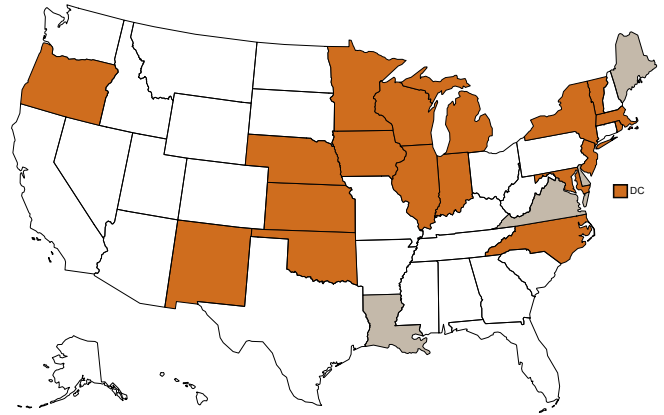
Getting free tax preparation at a United Way VITA site made a big difference for one family in Dallas, Texas. The family qualified for the federal EITC and received a \$6,000 refund. The refund was direct-deposited in the family's bank account less than two weeks later and helped pay for children's clothes, a crib, and a car.

Does Your State Have a Child and Dependent Care Tax Provision?



- State has a *refundable* provision
- State has a provision

Does Your State Have an Earned Income Tax Credit?



- State has a *refundable* credit
- State has a credit

Some additional states have other tax provisions especially for low-income families. For example, **New Mexico** has a low-income comprehensive tax rebate—a refundable credit similar to the federal Earned Income Tax Credit.

The National Women’s Law Center Wants to Help You Get Started!

We have outreach materials, including federal and state-specific materials and this Toolkit, all of which are available on our website (www.nwlc.org/loweryourtaxes). In addition, we host conference calls and webinars on outreach activities, conduct trainings on the tax credits, and can provide technical and media assistance. We’re here to help you help families put money back in their pockets.

For more information, contact Melanie Ross Levin at mrosslevin@nwlc.org.

How To Use This Toolkit

There is a wide variety of effective outreach activities, and every organization’s outreach campaign is different. You can decide what activities work best for you based on your resources, and build on your existing partnerships and efforts to share information with the families you serve. Learn about sample outreach activities on pages 5-9, consult the campaign timeline on page 10, and design an outreach campaign that works for you. Please don’t hesitate to contact the Center if you have questions.

Once you have planned your outreach campaign, visit the National Women’s Law Center’s website (www.nwlc.org/loweryourtaxes) for materials. (See page 5 for a list of available materials).

If you are not a member of the Center’s network, **sign up on our website** so that we can stay in touch about your campaign activities. You’re on your way to helping families put money back in their pockets!

Your Outreach Campaign Cheat Sheet

Get the Facts About Tax Credits and Free Tax Preparation Services

1. Check the Center's tax credits outreach campaign website for materials and resources.
2. Contact your local IRS office to obtain additional tax outreach materials, and information about free income tax-preparation assistance.

Partner Up to Expand Your Reach

3. Work with an existing coalition of community organizations to enhance the overall outreach efforts in your state and community.
4. Work with other advocacy or service organizations in your community to distribute materials to more families.
5. Work with local businesses to inform their employees and their customers about the potential for tax savings and refunds from claiming tax credits.
6. Work with state and local government agencies to help distribute tax credits information to families.
7. Contact your public officials about getting involved in tax credits outreach.

Spread the Word About Tax Credits to Families With Children

8. Hand out fliers in advocacy offices, child care programs, community organizations, and service providers, and distribute tax materials to your networks, in print and electronically.
9. Use your monthly or quarterly newsletters to share information about tax credits (and ask other organizations to do so as well!).
10. Provide information on tax credits and your outreach campaign on your website.
11. Hold meetings with parents to inform them about tax credits.
12. Prepare information and resources to be given out over the phone.
13. Advertise in public places, such as billboards, buses, bus shelters, playgrounds and store fronts.

Work with the Media

14. Talk to reporters and feature writers of state and local newspapers, and to local radio stations, to discuss your outreach campaign and the importance of claiming these tax credits.
15. Write letters to the editor about the importance and value of these tax credits.
16. Use Public Service Announcements to get the word out.
17. Distribute a press release to reporters in your state containing information about your outreach campaign and the importance of these tax credits.
18. Coordinate or participate in a press event about tax credits outreach in your state or community.

Tools for Your Outreach Campaign

There are many different ways to get involved in tax credits outreach. Tax credits outreach can range from simple activities—distributing fliers about tax credits to families through child care programs, community events, or conferences—to the more complex—creating public service announcements and arranging for their air time on television and radio stations. The more complex outreach techniques require more preparation and you will need to start planning early. Some forms of outreach also require more resources and you may need to fund-raise in advance. See the timeline on page 10 to learn when to start preparing to use these outreach methods.

Whether you are a child care advocate, a child care provider, union member, or work at a community-based organization or service provider, there are many ways that you can help families in your communities take advantage of valuable tax credits. Here are some activities and tips for conducting a successful tax credits outreach campaign in your community:

Get the Facts About Tax Credits and Free Tax Preparation Services

1. Check the Center’s tax credits outreach campaign website for materials and resources. Every year, the Center provides a variety of outreach materials for your use, including:

- **Fliers** that can be distributed in any state to inform families about the federal credits and how much they may be worth, including contact information for free tax-preparation services (in English, Spanish, Mandarin Chinese, and Vietnamese).
- **State-specific fliers**, which include information about state child and dependent care tax provisions and state earned income tax credits for states where they are available (in English, Spanish, and some other languages).

- **Fact sheets** providing a brief overview of the federal Child and Dependent Care Tax Credit, Earned Income Tax Credit, Child Tax Credit, and Making Work Pay Credit, and commonly asked questions-and-answers about each of these federal credits.
- **Scripts for radio and television** public service announcements and a national press release announcing the campaign kick-off.
- Additional **campaign materials** such as sample newsletter articles, fact sheets, and a media tipsheet.

Many of these materials are provided in Spanish, which is important because the IRS has not translated many key tax documents into Spanish. Some materials are also provided in Mandarin Chinese and Vietnamese. Look for materials for the 2011 tax filing season late this fall at www.nwlc.org/loweryourtaxes. **And feel free to link to NWLC’s materials on your website!**

2. Contact your local IRS office to obtain additional tax credits outreach materials and information about free tax preparation assistance. You can find your local IRS office at <http://www.irs.gov/localcontacts/index.html> or by calling 1-800TAX-1040.

The IRS can provide materials, including free posters, and contacts with local coalitions.

In addition, your local IRS office can provide information about IRS-sponsored free tax-preparation services in your community. These services may be available in your community for low-and moderate-income families and tax filers over age 60, and can save families hundreds of dollars in tax-preparation fees and preserve their refunds. Many free tax-preparation sites utilize e-filing through the IRS, which allows tax filers to get their refunds within two to three weeks of filing their tax returns.

Contact your local IRS office to find Volunteer Income Tax Assistance (VITA), Tax Counseling for the Elderly (TCE), and AARP-Tax Aide sites in your state or community. If you let your local IRS office know that you will be using this information

to direct families to free income tax-preparation services during your outreach campaign, you may be able to get the information earlier than it is otherwise made available to the public.

You can also talk to the IRS about volunteering or hosting a VITA site through your organization.

Partner Up to Expand Your Reach

Partnering with state and local coalitions, organizations, businesses and government offices can expand the scope of your campaign. Partnering with others may also help you secure funding for your campaign from state and local foundations, public agencies, or businesses.

3. Work with an existing coalition of community organizations to enhance the overall outreach efforts in your state and community.

Be sure to include other organizations that work with low-and moderate-income families and organizations that conduct tax credits outreach or provide free income tax-preparation assistance.

- The New York State Child Care Coordinating Council partnered with members of the CA\$H Coalition, a group of social service organizations, government agencies, financial institutions, and private businesses dedicated to promoting financial stability and asset building for residents of New York’s Capital District. By pooling their resources, the groups were able to conduct an eight-week radio campaign in which 43 participating radio stations aired over 1,771 spot announcements.

The following websites may provide you with information about organizations conducting tax credits outreach and providing tax-preparation assistance in your area:

- **The National EITC Outreach Partnership,** <http://www.cbpp.org/eitc-partnership/eitc-partnership.htm>.
- **The National Community Tax Coalition,** <http://www.tax-coalition.org>.

4. Work with other advocacy or service organizations in your community to distribute

materials to more families.

- New Mexico Voices for Children focused on spreading information to networks, coalitions and organizations that had lots of member organizations or offices statewide. They partnered with food bank networks, Head Start programs, large hotels, Albuquerque Public Schools (the largest school district in the state), New Mexico Conference of Churches, county health councils, the Hispano Chamber of Commerce, and others. Through their partnerships, they were able to reach an estimated 147,000 families!
- The Nebraska Children and Families Foundation distributed hundreds of thousands of fliers and other materials during their outreach campaigns, through partnerships with community service organizations including the Omaha Chamber of Commerce, tribal community social services offices, Latino faith communities, Nebraska public schools, free tax-assistance sites, public libraries, and food pantries. By working with the Mexican American Commission, the Nebraska Children and Families Foundation was able to reach more Spanish-speaking families.

5. Work with local businesses to inform their employees and their customers about the potential for tax savings and refunds from claiming tax credits.

- Ask local businesses to post tax credits fliers and include tax credit information in paycheck or billing envelopes to increase customer and employee awareness of tax credits.
- The Oregon Child Care Resource & Referral Network worked with Bi-Mart stores, a membership discount chain store in Oregon, to post tax credit fliers on bulletin boards in all 55 of their stores around the state.
- Louisiana Agenda for Children worked with employers in the hospitality industry during one campaign season to distribute payroll stuffers to employees, including Best Western, Courtyard by Marriot, Embassy Suites, Holiday Inn and Fairfield Inn hotels throughout the state.

6. Work with state and local government agencies to help distribute tax credits information to families. State departments and offices of child care, housing, human services, and revenue, for example, may agree to distribute tax information to families. Contact these and other state and local departments about distributing information in their mailings, newsletters, meetings, or on their websites.

- The Oregon Child Care Resource & Referral Network teamed up with the Oregon Department of Human Services to mail English and Spanish tax credit materials to approximately 28,000 families, including 10,000 families receiving child care assistance.
- The New Mexico Human Needs Coordinating Council partnered with the state agencies that administer child care subsidies, Temporary Assistance for Needy Families, Medicaid, Food Stamps, and Head Start to send mass mailings of their tax credits outreach flier, reaching over 130,000 low-income families.

7. Contact your public officials about getting involved in tax credits outreach. The governor's, mayor's, or county commissioner's office may provide essential support to your outreach campaign, allowing you to reach more families in your state.

For example, your governor, lieutenant governor, or other elected official may agree to be a spokesperson in a public service announcement or press event. Public officials also can help by including information on tax credits on their websites and in constituent newsletters.

- Nebraska Children and Families Foundation held several kick-off events for their "Save the state, spend the fed!" tax outreach campaign. The Lincoln and Omaha events were keynoted by the mayors of each city and the Kearney kickoff featured Miss Nebraska.
- The Iowa Child and Family Policy Center worked with its coalition to organize a press conference featuring Iowa's Lieutenant Governor and several state legislators.

Spread the Word About Tax Credits to Families with Children

8. Hand out fliers in advocacy offices, child care programs, community organizations, and service providers, and distribute tax materials to your networks, in print and electronically.

9. Use your monthly or quarterly newsletters to share information about tax credits (and ask other organizations to do so as well).

- In 2010, Crystal Stairs, Inc., in Los Angeles put information about tax credits in their winter newsletter, which reached over 14,000 parents and child care providers.

10. Provide information on tax credits and your outreach campaign on your website. Be sure to include links to IRS, your state revenue department, the National Women's Law Center, and other national and state organizations that conduct tax credits outreach. Include a link to your website in newsletters, fliers or other materials that you distribute in print or electronically.

- The number of visitors to the Oregon Child Care Resource & Referral Network website increased from 8,880 to 19,000 during the active months of the Network's first outreach campaign.
- The Minnesota Child Care Resource and Referral Network has tax credits information on its dedicated Child Care Financial Aid website.

11. Hold meetings with parents to inform them about tax credits. By educating families directly, you can arm them with the knowledge that they need to inform others in their communities about tax credits.

- The California Child Care Resource & Referral Network and Parent Voices conducted numerous advocacy trainings for parent leaders about these valuable tax credits. Parents then returned to their local communities to inform others.

Also find out whether you can distribute tax credits outreach materials or do a presentation on tax credits for child care providers and advocates.

12. Prepare information and resources to be given out over the phone. Train the members of your staff who answer the main phone line to provide information about tax credits and free tax-preparation sites. Be prepared to refer callers to additional resources about tax credits. **Make sure that callers know that you cannot give them detailed tax advice!**

- The California Child Care Resource & Referral Network used its consumer education hotline to provide information about tax credits and referrals to VITA sites to over 2,150 callers.

Find out whether your outreach partners or state or local governments have toll-free public information hotlines and would be willing to provide tax credits outreach information to callers.

- The state of Iowa offers a statewide, toll-free number with information about various services, from food stamps to energy assistance. The Child and Family Policy Center worked with a coalition to ensure that information about tax credits was disseminated through the toll-free number.

13. Advertise in public places—such as billboards, buses, bus shelters, playgrounds and store fronts. To get started, contact municipal transportation departments and local media outlets and ask them about placing signs and billboards during tax-filing season.

- The New Mexico Human Needs Coordinating Council and YWCA of the Middle Rio Grande placed signs on city buses in Albuquerque during two outreach campaigns.
- Using donated space from Clear Channel Communications, the Ohio Child Care Resource & Referral Association and Center for Community Solutions used billboards in Akron, Canton, and Cleveland to publicize the credits. Clear Channel donated 10 billboards in each of these large Ohio cities.

Work with the Media

You can engage the media through letters to the editor, talking to reporters, issuing press releases about your campaign, or by organizing press events to generate media coverage.

For more details, check out the Center's media tip-sheet on our website (www.nwlc.org/loweryourtaxes).

14. Talk to reporters and feature writers of state and local newspapers, and to local radio stations, to discuss your outreach campaign and the importance of claiming these tax credits. This year, increases in federal tax credits could mean increased tax assistance for many hard-pressed families, which may affect media coverage.

Keep in mind that you may be able to reach families through Spanish-or other non-English media that do not regularly access mainstream English-language print media or the Internet.

Have parents available to talk to the press about how they benefited from these tax credits.

- California's Parent Voices ran a story in the Children's Advocate about a parent who received a substantial tax credit refund after she attended a Parent Voices rally. The single mother's refund allowed her to pay for dental work for her daughter, pay off debt, repair her car, save some money, and take her family on vacation!

15. Write letters to the editor about the importance and value of these tax credits. If you see a relevant story in the newspaper, ask families you work with to follow up with letters to the editor.

- The Ohio Child Care Resource and Referral Association placed letters to the editor informing families about tax credits in 17 newspapers across the state with a total audience of 436,000 Ohioans.

16. Use Public Service Announcements to get the word out. Public Service Announcements, aired on local television or radio can be a great way to educate parents about tax credits.

- Nebraska Children and Families Foundation worked with the Department of Health and Human Services and the Nebraska Tax Coalition to run approximately 5,500 radio and television spots on network TV through the Nebraska Broadcasters Association.
- The New York State Child Care Coordinating Council (NYSCCCC) ran PSAs on the radio via the New York State Broadcasters Association throughout the 2007 tax season. As a result, the number of parents asking NYSCCCC for information about tax credits increased significantly.

17. Distribute a press release to reporters in your state containing information about your outreach campaign and the importance of these tax credits. The Center can help you prepare a press release for distribution in your state. For more information, contact Melanie Ross Levin at mrosslevin@nwlc.org.

- Iowa's Child and Family Policy Center distributed a press release to local media. A statewide news service did a feature story that was played on 57 different radio stations.

18. Coordinate or participate in a press event about tax credits outreach in your state or community. Get started by determining whom you want to deliver your message. Getting a public official to participate can help garner media attention, and the official's public information staff can help plan and publicize the event. Release a media advisory and make media calls in advance of your press event to announce the time and place of the event.

- The California Child Care Resource & Referral Network and Parent Voices partnered with the Legislative Women's Caucus to hold press conferences in the San Francisco Bay Area. Women legislators across the state spoke about the importance of state and federal tax credits.
- New Mexico Voices for Children held a Child Care Tax Credits press conference in partnership with Central New Mexico Community College, Tax Help New Mexico, Lieutenant Governor Diane Denish, and the Community Hearth Partnership (CHP), an organization that works with Mexican immigrant families in one low-income neighborhood in Albuquerque. The press conference garnered media coverage on two television stations, 29 radio stations, one newspaper, one column, and several community calendar listings.

Now you're ready to start your Tax Credits Outreach Campaign!

Using any of these outreach techniques will inform individuals and families in your state and community about valuable tax credits and help put money in the pockets of the families with whom you work. Contact the National Women's Law Center to get started on your campaign! To join the Tax Credits Outreach Campaign, contact Melanie Ross Levin at mrosslevin@nwlc.org.

Campaign Timeline

Throughout Fall 2010

- ★ Contact the Center to join the tax credits outreach campaign for the 2011 tax filing season.

October/November 2010

- ★ Identify possible outreach partners, including state and local coalitions, community organizations, businesses, the IRS, and state, local, and county government offices.
- ★ Contact state and local foundations and businesses for funding and in-kind support for your campaign.
- ★ Call your governor's, mayor's, or county commissioner's office about participating in your campaign or appearing in a public service announcement.
- ★ Participate in the Center's webinars to learn more about tax credits outreach and obtain the Center's materials to distribute during your campaign.
- ★ Prepare newsletter articles on tax credits and your campaign for end-of-year newsletters.
- ★ Ask large employers to distribute tax credits outreach materials to their employees.
- ★ Be on the lookout for upcoming conferences and meetings where you can distribute tax credits outreach materials.

December 2010

- ★ Contact your local IRS office to find out where free income tax-preparation services (sometimes called VITA sites) will be available and to get additional materials for your campaign.
- ★ Check the Center's website for additional outreach materials.
- ★ Forward fliers to outreach partners for distribution in early January.
- ★ Train staff answering office phones or dedicated phone lines to provide information about tax credits and VITA sites to callers.

- ★ Plan meetings in child care and Head Start centers, prekindergarten programs, family child care homes, and after-school programs to educate providers and families about tax credits for January and early February.

January 2011

- ★ Issue a press release announcing the kick-off of your campaign and work to generate media stories on the credits and their value to families.
- ★ Post tax credits outreach materials on your website and encourage your partners to do the same.
- ★ Start distributing fliers to families in your state and post tax materials in child care and Head Start centers, prekindergarten programs, family child care homes, and after-school programs.
- ★ Begin airing public service announcements and advertisements that will run for the rest of the tax filing season.

February 2011

- ★ Continue running public service announcements and advertisements.
- ★ Work to generate media stories highlighting parents in your community that have benefited from the tax credits.
- ★ Continue distributing fliers to the families in your state.

March 2011

- ★ Issue a press release and contact reporters to urge them to include tax credits information in their end-of-tax-filing season stories.
- ★ Continue distributing fliers to the families in your state.

April 2011

- ★ Wrap up your campaign and crunch the numbers. Determine the number and kinds of materials you distributed and the number of families reached, including through the media.
- ★ Thank your partners for their contributions.
- ★ Celebrate a job well done!



YOU'VE BEEN WORKING HARD— GET THE TAX CREDITS YOU DESERVE!

Families in California:

Whether or not you owe income tax, you could get thousands of dollars in tax credits. You could qualify for:

- \$** Up to **\$2,100** from the federal Child and Dependent Care Tax Credit and up to **\$1,050** from the California Tax Credit for Child and Dependent Care Expenses.
- \$** Up to **\$5,666** from the federal Earned Income Credit.
- \$** Up to **\$1,000** per child from the federal Child Tax Credit.
- \$** Up to **\$800** from the Making Work Pay Credit, if you haven't already received it in your take-home pay.

***More families than ever are eligible for these credits this year.
To get these credits, you must file a tax return.***

Find out where you can get FREE help with your taxes by calling the IRS toll-free at (800) TAX-1040 or (800) 829-1040. Or go to www.irs.gov/individuals/topic. You can also contact Child Care Connection toll-free at (800) KIDS-793 or (800) 543-7793.

For more information:

www.nwlc.org/loweryourtaxes

IRS information about the family tax credits

www.eitc.irs.gov/central/abouteitc/ (EITC)

<http://www.irs.gov/newsroom/article/0,,id=106182,00.html> (Child Tax Credit)

<http://www.irs.gov/taxtopics/tc602.html> (Child and Dependent Care Tax Credit)

<http://www.irs.gov/newsroom/article/0,,id=204447,00.html> (Making Work Pay Credit)

IRS resources in Spanish

<http://www.irs.gov/espanol/index.html>

Information about free tax preparation assistance

<http://www.irs.gov/individuals/article/0,,id=107626,00.html>

http://www.aarp.org/money/taxes/aarp_taxaide/

<http://www.tax-coalition.org/>

<http://eitcoutreach.org/>