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# Mayor Bloomberg, Consumer Affairs Commissioner Mintz And Center For Economic Opportunity Executive Director Morse Kick Off City's Annual Tax Campaign

***H&R Block Partners to Waive Fee for Casualty Loss Tax Form for New Yorkers in Sandy-Affected Zip Codes***

***City Offers Free or Low Cost Tax Preparation for Low Income New Yorkers and Urges Them to File for Important Credits including the Earned Income Tax Credit***

Mayor Michael R. Bloomberg, [Department of Consumer Affairs](#) (DCA) Commissioner Jonathan Mintz, and [Center for Economic Opportunity](#) (CEO) Executive Director Kristin Morse today launched New York City's 11th Annual Tax Credit Campaign. Tax season has begun and the IRS has now begun accepting 2012 returns. The City offers three different ways for eligible New Yorkers to file their taxes and claim their tax refunds for free or at very low cost, as well as a tax-time savings program called SaveUSA. The City's online tax preparation and free tax sites are available now and the City-sponsored H&R Block coupon will be valid beginning Friday, February 1st. The City has also partnered with H&R Block to allow New Yorkers who live in Hurricane Sandy-affected [zip codes](#) and suffered the loss of their homes, household items, or vehicles to be able to file the casualty loss form ([Form 4684](#)), which may reduce taxable income, for free at any H&R Block location in the City. City partners have opened additional Volunteer Income Tax Assistance (VITA) sites in Far Rockaway and Red Hook.

"The City is here to help New Yorkers file their taxes – which can mean more money back for bills, schooling or to cover an unexpected expense," said Mayor Bloomberg. "In fact, last year's Tax Credit Campaign helped more than 100,000 New Yorkers file their taxes through one of our free or low cost options and claim more than \$162 million in tax credits and refunds."

"This year, in addition to encouraging all New Yorkers to claim their refunds by filing their taxes for free or low cost, we want to make sure that we also address the needs of those affected by Superstorm Sandy," said DCA Commissioner Mintz. "We are grateful to H&R Block for agreeing

to let all residents in affected areas file the casualty loss form for free at any of their sites around the City. Contact 311 or visit [nyc.gov](http://nyc.gov) for more information and go get your refund!

### ***Free or Low Cost Tax Preparation***

Since 2002, the City of New York has promoted the Earned Income Tax Credit (EITC) and encouraged New Yorkers to file their taxes for free or at low cost by contacting 311 or visiting [nyc.gov](http://nyc.gov). Last year's Tax Credit Campaign helped more than 100,000 New Yorkers file their taxes through one of the City's free or low cost options to claim more than \$162 million in tax credits and refunds. Over the past decade, the Mayor's EITC Campaign helped New Yorkers claim more than \$20 billion in federal, State and City refunds, including \$1 billion directly through the City's network of free and low-cost sites.

The City's Annual Tax Credit Campaign increases awareness about tax credits that puts money back in the pockets of working New Yorkers, and helps qualifying New Yorkers file their taxes online for free or at low cost. New Yorkers eligible to receive the EITC could receive up to \$7,953 and working families with children three years old and younger could be eligible for up to \$1,733 with the New York City Child Care Tax Credit (NYC CCTC). The NYC CCTC assists families with low incomes, or who are underemployed, with the cost of child care.

The City's free and low cost tax filing options:

- New Yorkers with children who earn less than \$50,000 or those without children who earn \$18,000 can visit one of 91 VITA sites in the five boroughs where a certified volunteer will prepare their taxes for free.
- New Yorkers earning less than \$57,000 can also file their taxes online for free through the City's free tax-prep website at [nyc.gov](http://nyc.gov). The City partners with Intuit Inc.'s Turbo Tax Freedom Edition and [myfreetaxes.com](http://myfreetaxes.com), powered by H&R Block, to offer these services. The casualty loss form is also included in these preparation options.
- New Yorkers who earn less than \$41,000 with children or \$18,000 if they don't have children can also have their tax returns prepared at one of 51 participating H&R Block locations for just \$49 with the City-sponsored coupon, which can be downloaded from [nyc.gov](http://nyc.gov). The casualty loss form is also included in these preparation options. New Yorkers who used the coupon in 2012 can return to a participating H&R Block and file their return using the same discounted rate in 2013.
- All New Yorkers who live in [zip codes](#) affected by Hurricane Sandy are eligible to file the casualty loss form for free at any H&R Block regardless of income.

**SaveUSA**

New Yorkers visiting designated Volunteer Income Tax Assistance (VITA) sites have the opportunity to participate in the City's SaveUSA program, a unique savings program for tax filers. Participants selected for the program could receive a 50 percent match, up to \$500, if they deposit at least \$200 of their tax refund into a SaveUSA account and maintain the initial deposit for one year. There is no penalty for withdrawing refund deposits before the end of the year, though those who do would become ineligible for matching funds.

The SaveUSA program, which originated in 2008 as \$aveNYC, is now being replicated in three additional cities: San Antonio, Newark, and Tulsa. In 2012, the program helped almost 1,600 tax filers across the four cities save approximately \$1.6 million, which includes initial savings amounts plus matching funds. In New York City, almost 600 low-income tax filers are on track to have nearly \$630,000 in total savings, which includes initial savings plus matching funds. Savers are due to receive their match on February 1.

Funded through a Social Innovation Fund grant awarded to the Mayor's Fund to Advance New York City, this national replication project is implemented locally through the Food Bank for New York City and Ariva, in partnership with Capital One Bank, Spring Bank (formerly known as CheckSpring Bank), and Carver Federal Savings Bank. Additional support for the New York City program is provided by the Ford Foundation, Bloomberg Philanthropies, Open Society Foundations, The Rockefeller Foundation, and the Annie E. Casey Foundation. MDRC, a nonpartisan education and social policy research organization, is studying the SaveUSA program to determine if there are any impacts on the overall financial well-being of participants.

"SaveUSA represents just one of the many innovative strategies the City has spearheaded to help working families make the most of their tax returns," said CEO Executive Director Morse. "With tax season upon us, we also continue to work to ensure that all eligible New Yorkers take full advantage of the Earned Income Tax Credit, which has reduced childhood poverty and increased earnings for families with children. SaveUSA helped many of our most vulnerable families save more than \$600,000 last year, and we look forward to seeing those savings grow even more as New Yorkers get their 2012 refunds."

The **Department of Consumer Affairs** (DCA) enforces the Consumer Protection Law and other related business laws throughout New York City. Empowering consumers and businesses to ensure a fair and vibrant marketplace, DCA licenses more than 78,000 businesses in 55 different industries. Through targeted outreach, partnerships with community and trade organizations, and informational materials, DCA educates consumers and businesses alike about their rights and responsibilities. DCA's Office of Financial Empowerment (OFE) is the first local government initiative in the nation with a mission to educate, empower, and protect New

Yorkers with low incomes so they can build assets and make the most of their financial resources. Toward that end, OFE seeks to increase access to high-quality, low-cost financial education and counseling; improve access to income-boosting tax credits; connect households to safe and affordable banking and asset-building products and services; and enforce and improve consumer protections to enhance financial stability. For more information, call 311 or visit DCA online at [nyc.gov](http://nyc.gov)

The **Center for Economic Opportunity** (CEO) fights the cycle of poverty in New York City through innovative programs that build human capital and improve financial security. Launched by Mayor Bloomberg in 2006, CEO works with both City agencies and the federal government to implement successful anti-poverty initiatives in New York and partner cities across the United States. Among CEO's greatest successes have been the creation of the Office of Financial Empowerment, CUNY ASAP, Jobs-Plus, and a more accurate measure of poverty. Several CEO initiatives have been incorporated into the Young Men's Initiative, a comprehensive and expansive program designed to address disparities between young African-American and Latino men and their peers. CEO oversees rigorous evaluations of each program to determine their effectiveness in reducing poverty, encouraging savings, and empowering low income workers to advance in their careers. Located in the Office of the Mayor, CEO is led by Executive Director Kristin Morse. Follow CEO on Twitter at [@NYCOppportunity](https://twitter.com/NYCOppportunity), or visit the [NYC Opportunity](https://www.nyc.gov/nyco) page on Facebook.

### **Tax Preparation Required Documents**

***If you are claiming losses as a result of Hurricane Sandy, your tax preparer will need the following:***

- Complete list of personal and non-real estate items lost in the disaster
- Full inventory of items lost or damaged and the value of the items; see [IRS Publication 584, Casualty, Disaster, and Theft Loss Workbook \(Personal-Use Property\)](#)
- Insurance reimbursement documentation, if available
- All types of FEMA reimbursement documentation, if applicable
- Any contractor estimates and repairs or replacement costs to damaged property
- Copies of your Federal tax returns for the last three years, if available

***When having someone prepare your taxes in person, bring:***

- Proof of identity, such as a driver's license or other photo ID

- Social Security cards for yourself, your spouse, and your dependents and/or a Social Security Number (SSN) verification letter from the Social Security Administration OR Individual Taxpayer Identification Number (ITIN) letter for all names on the return (original or copies)
- Birth dates for yourself, your spouse, and the dependents on the return
- Wage and earning statement from your employer(s): Form W-2, W-2G, 1099-R
- Interest and dividend statements from banks (Forms 1098 and 1099)
- A copy of your 2011 federal and state returns, if available
- Proof of any other income, e.g., lottery winnings
- Total paid for child care provider and the provider's Taxpayer Identification Number or SSN (if you are claiming the New York City Child Care Tax Credit)
- Bank account and routing numbers (if you are directly depositing your refund). Note: If you use direct deposit, you should receive your federal tax refund within 21 business days.
- To file a Married Filing Jointly return, both spouses must be present to sign required forms.

***When preparing taxes online, you'll need:***

- Social Security Number (SSN) OR Individual Taxpayer Identification Number (ITIN) for yourself, your spouse, and the dependents on the return
- Birth dates for yourself, your spouse, and the dependents on the return
- Your 2011 Adjusted Gross Income (AGI) or Self-Select PIN number. (AGI is the amount shown on your 2011 Form 1040, line 38; Form 1040A, line 22; or Form 1040EZ, line 4. The Self-Select PIN is the five-digit PIN you used to electronically sign your 2011 return.) If you cannot find this information, call the Internal Revenue Service (IRS) at 1-800-829-1040.
- Wage and earning statement from your employer(s): Form W-2, W-2G, 1099-R
- Interest and dividend statements from banks (Forms 1098 and 1099)

- Proof of any other income, e.g., lottery winnings
- Total paid for child care provider and the provider's Taxpayer Identification Number or SSN (if you are claiming the New York City Child Care Tax Credit)
- Bank account and routing numbers (if you are directly depositing your refund). Note: If you use direct deposit, you should receive your federal tax refund within 21 business days.

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