To our partners:

At Accounting Aid Society, we believe in creating an economy that works for everyone. Together, we’ve been using taxes to build relationships and relationships to build futures for more than 47 years. You’ve invested millions of dollars, and hundreds and thousands of hours of your time. We are so pleased to share with you this report, which demonstrates the impact of your investment across the entire region.

This year was an exciting one for us – we undertook a period of reflection and strategic planning and engaged in intensive work around what the future looks like, not only for Accounting Aid, but more importantly, what the future can look like for those we serve.

Our current model has been effective for many years, but as all things change, so must we. While we continue to prepare nearly 18,000 individual tax returns and serve over 1200 small businesses annually, we are increasingly focused on ways to engage technology and other processes in order to increase our capacity and serve more families and small businesses. This is a delicate balance as it requires us to continue full speed ahead, while also carving out time and capacity for innovation.

The work however, remains critical. As you will read in the following pages, research continues to demonstrate that access to the Earned Income Tax Credit (EITC) and Volunteer Income Tax Assistance (VITA) is directly connected to improved outcomes in education and school performance, in college access and enrollment, in maternal and child health and in providing for seniors in retirement. Quite simply, it remains one of the most successful anti-poverty tools available to us in the United States.

Special thanks to each and every one of you. The thousands of families and hundreds of small businesses served through your generosity and commitment thank you as well. With your continued investment, we are poised to accomplish so much more. Read on to learn more about how you’re impacting lives and what we can do together in 2020 and beyond.

In gratitude,

Kathleen Hatke Aro
President

Robert Zalewski
Board Chair

accountingaidsociety.org
Working-Family Tax Credits Help at Every Stage of Life

The Earned Income Tax Credit (EITC) and Child Tax Credit (CTC) not only reward work and reduce poverty for low- and moderate-income working families with children, but a growing body of research shows that they help families at virtually every stage of life:

**Improved infant and maternal health:** Researchers have found links between increased EITCs and improvements in infant health indicators such as birth weight and premature birth. Research also suggests receiving an expanded EITC may improve maternal health.

**Better school performance:** Elementary and middle-school students whose families receive larger refundable credits (such as the EITC and CTC) tend to have higher test scores in the year of receipt.

**Greater college enrollment:** Young children in low-income families that benefit from expanded state or federal EITCs are more likely to go to college, research finds. Researchers attribute this to lasting academic gains from higher EITCs in middle school and earlier. Increased tax refunds also boost college attendance by making college more affordable for families with high-school seniors, research finds.

**Increased work and earnings in the next generation:** For each $3,000 a year in added income that children in a working-poor family receive before age 6, they work an average of 135 more hours a year between ages 25 and 37 and their average annual earnings increase by 17 percent, leading researchers have found.

**Social Security retirement benefits:** Research suggests that by boosting the employment and earnings of working-age women, the EITC boosts their Social Security retirement benefits, which should reduce poverty in old age. (Social Security benefits are based on how much one works and earns.)

Note: For further details on the research see Chuck Marr, Chye-Ching Huang, and Arloc Sherman, “Earned Income Tax Credit Promotes Work, Encourages Children’s Success at School, Research Finds,” CBPP
While Mr. Ortiz was having his taxes prepared, we learned he had a difficult year and was in danger of losing his home due to tax foreclosure. Thanks to support from Quicken Loans, Accounting Aid was able to cross train site coordinators in preparing property tax exemption applications for homeowners going through hard times. Mr. Ortiz was able to have his property tax exemption completed while having his taxes done. This holiday season, Mr. Ortiz will be warmly celebrating at home thanks to you and supporters like Quicken Loans.

While attending a financial coaching session, Darryl shared he had also recently lost his job and hadn’t filed taxes in several years as he was afraid of owing money he couldn’t afford to pay back without taking food off his family’s table. Accounting Aid was able to prepare 4 years of back taxes for Darryl and he was pleasantly surprised to learn his tax picture was much different than he had imagined. Perhaps more importantly, his preparer was able to advise him on adjusting his withholding status so that he need not worry about owing in the future, either. Darryl followed up this good news with opening a bank account for the first time and creating a savings plan.

Thanks to you, Mr. Ortiz is keeping his home:

We use taxes to build relationships.

Because of you, Darryl is no longer in debt:
Thanks to you, Latanya, is building her family’s future:

Working full time and raising a family, Latanya appreciates the convenience of Accounting Aid’s virtual VITA program—she can bring in her tax documents at a location close to home, then pick up her prepared return at her convenience once it is ready. Latanya shared, “Using this service has afforded me the opportunity to get back on track with my finances, purchase a car, and new beds for the kids. This year I received a large return due to my EITC and Child Tax credits. Getting that much back in my refund allowed me to send my daughter to study abroad in Germany, and I was able to pay back a loan and put some money away to save.”

And relationships to build futures.

You gave David a second chance at a future:

David had recently been incarcerated and was working hard to reenter the workforce. His family was understandably struggling and he was looking for relief. Prior to his brief incarceration, David had been employed and had not yet filed his taxes. Unaware of the Earned Income Tax Credit, David received a significant refund when he filed with Accounting Aid Society—so significant, he was able to pay off back rent, bring their utility bills current and set some extra aside for emergencies. David shared, “The availability and ease of access with tax prep has helped me and my family tremendously. Thank you.”
City of Detroit Mayor’s Earned Income Tax Credit (EITC) Initiative

Started in 2017, the purpose of the initiative has been to increase awareness of the credit and expand access to free tax preparation for all EITC-eligible Detroiters. At the direction of Mayor Mike Duggan, a group of stakeholders, including Accounting Aid Society as the lead operations agency, Bloomberg Associates and United Way for Southeastern Michigan, has been collaborating to reverse the trend of working Detroiters leaving approximately $80 million unclaimed each year in EITC refunds. Thanks to you, this program has returned over $179 million more to the pockets of working families in Detroit since its inception. Read more about the impact of your investment below:

2017 - 2019 COMBINED PROGRAM HIGHLIGHTS

**EITC CLAIMS – CITYWIDE IMPACT**

- $902 million in federal and state EITC claims
- 37,000 more Detroit claimants compared to 2016
- $179 million more claimed by Detroit residents compared to 2016
- Approximately $4,300 on average per new claimant filing

**VIRTUAL VITA (“Drop & Go”) MODEL**

- 19 Drop & Go Sites
- Over 2,000 returns processed

**ACCESSIBILITY**

37+ FREE Tax Preparation Sites geographically disbursed across the city of Detroit

**AWARENESS**

- 100 billboards
- Extensive media coverage (print, radio, TV)
- Water bill inserts and over 700 DDOT bus ads
- First ever Detroit Tax-a-Thon

“The wealthy have all kinds of tax breaks. People of lower income have one tax break; it’s called the Earned Income Tax Credit.” – Detroit Mayor Mike Duggan

“This year my EITC refund helped me purchase a new family car and fund my unpaid maternity leave.” – Moriah Allen, First-time filer, EITC recipient

“I applaud the efforts of the city to reach households who have not taken advantage of this important tax credit. My department stands ready to help any government or nonprofit organization interested in copying the Detroit model.” – State Treasurer Nick Khouri
Because of you, small business is thriving

Officially launched in 2019, the Accounting Aid Academy is creating an economy that works for everyone by ensuring small business owners know how to run the tax and financial operations of their businesses. Serving over 1200 small businesses, the Academy is increasing the sustainability of the small business ecosystem in Detroit, Highland Park, Hamtramck and beyond.

Moving back to Detroit in 2011, Kerrie Trahan had, in her words, “hit rock bottom”. Looking for a fresh start, she again moved, this time to South Korea, which is where she found yoga. She began thinking about ways to offer yoga for free back home in Detroit, and the idea for Yoganic Flow was born.

Returning to the city, she formed partnerships with schools, churches and community groups and her business model evolved organically. Accounting Aid has worked with Kerrie to ensure her business remains sustainable and doesn’t receive any tax surprises. Her Academy business analyst has also worked with her to deepen her understanding of the financial numbers behind the business model. Trahan sees a need for more accessible, inclusive yoga in her community and knows it can make an impact for every generation – from kids dealing with family stress to helping older adults build up or remain strong enough to carry their groceries.

Marlin Hughes, owner of Detroit Pepper Co., thought of the idea for the restaurant after family and friends enjoyed stuffed peppers he served at a gathering. It coincided with Hughes’ lifestyle and dietary changes as well as being a potential business he and his son, who has autism, could share. “It’s invigorating to be one of many entrepreneurs taking part in restoring East Warren into the thriving, walkable business district it once was…”, says Hughes.

The recipient of a competitive grant program, Marlin worked with Accounting Aid Academy to set up his chart of accounts and prepare other financial systems he would need to get his business off the ground.

“When we see entrepreneurs like Mr. Hughes turning a talent into a business, more Detroiter will see it can be possible for them as well”, said Mayor Mike Duggan at a recent press conference.
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While every effort has been made to ensure the accuracy of our donor lists, we would like to apologize in advance for any errors or omissions.
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### Pro Bono Volunteers

- Steve Averbuch, Enrolled Agent
- Crystal Chow, Attorney
- David Fleetham, CPA
- LeDeanna Guy, Enrolled Agent
- Emiko Hayashi, Attorney
- Evan Kaploe, Attorney
- Ana Kolosova, Attorney
- Gene Magidenko, Attorney
- Serj Mooradian, Attorney
- Herve Narcisse, Attorney
- Neal Nusholtz, Attorney
- Jassi Sachdev, Attorney
- Ed Sadik, Attorney
- Stuart Smith, Attorney
- Fletcher Starnes, Enrolled Agent
- John Starnes, Enrolled Agent
- Tina Tobin, Enrolled Agent
- Eric Wisniewski, Attorney

### Home Bound Volunteers

- John Lapcewich

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While every effort has been made to ensure the accuracy of our volunteer lists, we apologize in advance for any errors or omissions.
2020 INITIATIVES

We are committed to continued leadership and expansion of the City of Detroit Mayor’s Earned Income Tax Credit (EITC) Initiative to put more money back in the pockets of working Detroiter.

We are focused on educating the public about the benefits of the EITC and why tax preparation is directly related to economic mobility and is a powerful poverty alleviation tool.

We are creating an economy that works for everyone by making small businesses more sustainable.

We are developing and piloting new solutions to decrease time and resources spent preparing tax returns in order to serve more families and small businesses.
WAYS TO GET INVOLVED

Volunteer
If you can use a computer, you can volunteer with Accounting Aid. Email us at: volunteer@accountingaidssociety.org

Donate
Your support puts millions back into economies across southeast Michigan. Visit us at: accountingaidssociety.org and click on ‘Donate’!

Like Us
linkedin.com/company/accounting-aid-society/ and share or comment on our posts

Join Us
at the Give Back Gala 6pm Friday May 1, 2020 at the Garden Theatre in Detroit honoring the Achievements of Marshall J. Hunt

FY 2019 FINANCIALS

$643,835
Corporations

$56,564
Individuals

$586,247
Foundations

$111,117
Give Back Gala

$548,999
Government

$172,989
Program Income

Program Income

Corporations 30%

Government 26%

Give Back Gala 5%

Foundations 28%

Individuals 3%
President
Kathleen Hatke Aro

Officers
Chair
Robert Zalewski
Oxford Bank

Vice Chair
Lisa Howze
Davenport University

Secretary
Diane P. Dossin
Retired, Ford Motor Company

Treasurer
John Anstett
Masco Corporation

Directors
Gregory A. Nowak
Immediate Past Chair
Miller Canfield

Emily J. Baldwin
Quicken Loans

Kenneth A. Bluhm
Blue Cross Blue Shield of Michigan

Terry Conley
Grant Thornton LLP

La Shanda M. Davis
City of Detroit

Patricia DeGiuli
PwC

Rick Favor
Deloitte

Bridgett Feagin

Lisa R. Fort
Plante Moran, PLLC

Audrey J. Harvey
BCBSM Foundation

Tamara Johnson
DTE Energy

Bryan K. Kieler
PNC Bank

Ron Lang
Ford Motor Company

Jeramey J. Lynch
J.P. Morgan Private Bank

Nick W. Quigley
EV

David T. Rehrauer
KPMG LLP

Jassi S. Sachdev
Law Offices of Jassi S. Sachdev

Brendan Sullivan
BDO

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