



Impact **REPORT**

Accounting
AidSociety SINCE 1972
30
ANNIVERSARY

2022

Accounting
AidSociety SINCE 1972

Table of CONTENTS

Letters from the President and Board Chair	02
Our Mission	03
Client Highlight: LITC and CTC	04
Volunteer Spotlight and Fellowship Program	05
Client Highlight: THRIVE, Love Travels Imports	06
Financials	07
Donor List	08
Funder List	09
Volunteer List	10



Dear Accounting Aid Society Supporters, Friends, Volunteers and Partners,

In 2022, our agency celebrated its golden anniversary. 50 years and counting!

As the new President and CEO, I am so proud of our team as we attained this hallmark achievement. It is anniversaries like these that

give us the opportunity to reflect on all that has been accomplished in the name of helping others achieve financial stability and build an economy that works for everyone.

Over the last five decades, the agency has had some noteworthy achievements, including collaborating with the City of Detroit and its earned income tax credit (EITC) outreach and community education efforts, launching the Accounting Aid Academy to help small business owners, and opening a new Oakland County tax site on Woodward Avenue.

2021-2022 represented the beginning of a post-pandemic reset. Our volunteers renewed their

commitments to serving again, our staff and clients bravely returned to in-person tax preparation and filing services, and the agency leadership began important improvements. Working together, more than 15,000 tax returns were completed with an average refund of \$1,700, adding up to more than \$26 million in refunds for individuals and families.

As we look ahead to our next 50 years, our vision will be focused on relevancy, innovation and growth. We are committed to centering the client voice, valuing diversity, equity and inclusion, embracing collaboration, expanding our presence in communities, leaning into the effective support of small businesses, and supporting the professional development of staff.

The best is yet to come. We are forever grateful to all of you who have supported us in the best and worst of times. You enabled Accounting Aid Society to help those who needed it most. Thank you for being there. We humbly ask that you stick with us and watch us soar through the next 50 years.

Warm Regards,

Priscilla Perkins, President and CEO



To the Accounting Aid Community and beyond,

As chair of the Accounting Aid Society Board of Directors, I am proud of how the agency has responded in the face of a global pandemic whose devastating effects deepened the economic inequality experienced by the clients we serve.

As Accounting Aid continues to evolve post-pandemic and return to the more traditional forms of client service engagement, we look forward to expanding our reach and increasing the socioeconomic impact that our services have on the lives of some of the most vulnerable members of our community. Furthermore, as Corp! Magazine's 2022 Diversity Champion of the year, we remain committed to actively centering the client voice and experience in our program design and delivery with the most gratifying part of our work coming from the client testimonials we hear. It always warms my heart when a family can catch up on rent payments, and clothe

and feed their children with the extra money received each tax season.

As board chair, I have the honor and privilege of leading an esteemed group of professionals who represent diverse backgrounds, industries, and subject matter expertise that contribute to our ability to help advance the mission and vision of the agency. As we look to the future as ambassadors of this impactful work, Accounting Aid will continue to be a leader on the forefront of change. We will grow our volunteer base through intentional recruitment efforts, expand our reach and visibility through community engagement, and attract the resources – both human and capital – to advance the initiatives that our strategic partners and stakeholders have entrusted us to carry out year after year.

When asked to give an account of the impact we have made, we will let the compelling client testimonials speak for themselves.

In gratitude,

Lisa Howze, Board Chair



OUR MISSION

The mission of Accounting Aid Society is to provide tax assistance and other services to promote the economic self-sufficiency of low- to moderate- income families, seniors, and others in need through programs, volunteerism, and partnerships.

Accounting Aid works to achieve its mission through our...



Volunteer Income Tax Assistance Program (VITA)

No-cost tax help for households who need assistance in preparing their returns and navigating the tax process.



Low Income Taxpayer Clinic (LITC)

Education, outreach, and pro-bono legal representation to help lower-income and ESL taxpayers solve their tax problems.



Accounting Aid Academy

Culturally competent education, technical assistance, coaching and tax prep for small business owners in Metro Detroit.

Low Income Taxpayer Clinic Advocates for Taxpayers in Need

With pandemic-related stimulus payments and the Child Tax Credit on the table, taxpayers have a lot of questions about sometimes confusing protocols and practices, especially over the last two years. In 2022, Accounting Aid Society's Low Income Taxpayer Clinic (LITC) helped more than 200 taxpayers resolve issues from the IRS, ranging from liens to levies to Innocent Spouse Relief cases.

"We've been able to help a lot of people over the last two years with refunds," Frances Bayer, CPA and LITC Associate, says. "And a lot of those refunds have been used to help people catch up, to pay bills and put food on the table."

The Clinic had one client - a single mother with three children - who came to Accounting Aid because she didn't receive the Child Tax Credits or stimulus payments she was owed. After meeting with Frances, the Clinic was able to help her claim \$20,000 in refunds over two years.

"Everyone has their own story and every story is different," Frances says. "I've laughed with my clients and I've cried with my clients. I try to work with them and get them in compliance. All they need to do is call. We don't charge for our services. The most important step is picking up the phone and calling the LITC."

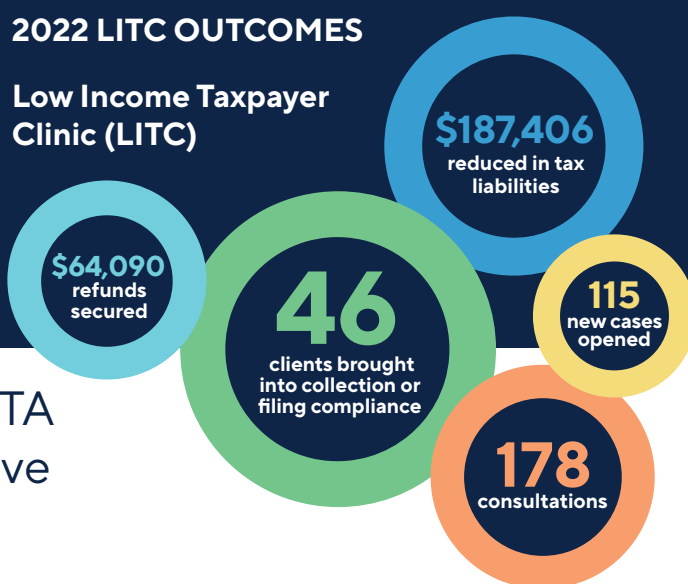
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"We emphasize that people shouldn't be afraid of the IRS and they shouldn't ignore problems. We can represent them with the IRS and we can negotiate on their behalf."

- Frances Bayer, Accounting Aid CPA and LITC Associate

2022 LITC OUTCOMES

Low Income Taxpayer Clinic (LITC)



Volunteer Income Tax Assistance VITA Program Helps Grandmother Receive Well-deserved Financial Support

Last year, Detroit resident Sharon Bayn was left wondering why she didn't receive any of the direct Child Tax Credit (CTC) payments sent out by the government in 2021. She was raising her teenage grandson, living on a fixed, limited income of less than \$1,000 a month. Because of her low income, she had not had to file taxes in recent years.

After volunteers went door to door in Sharon's neighborhood to let families know of their CTC eligibility, Sharon learned why she had not yet received those much-needed checks in the mail: only families who had filed taxes were receiving payments. She was then directed to Accounting Aid Society for help. Thanks to the expertise of the VITA team, Sharon was not only able to get all of the payments due to her, but was also able to qualify for the credit for the following tax year.

With the money she received, Sharon was relieved to be able to cover some of her daily expenses, including the rising cost of food, as well as pay bills, fix the family car, and buy clothes and Christmas presents for her grandson. As she told the Detroit Free Press, "(I)t's a blessing to me."

2022 TAX ASSISTANCE OUTCOMES





Volunteer Dedicates Nearly 25 Years – and Counting – to Helping Others

There are super volunteers, and then there is Lakshmi Sundaram, who has been lending her accounting expertise and passion for helping others to Accounting Aid Society's Volunteer Income Tax Assistance (VITA) program for nearly 25 years.

Lakshmi discovered the agency as a finance student at Oakland University and did three sessions of volunteer work. In 1998, she started volunteering with and helped clients file their returns for 18 straight tax seasons before moving out of Michigan. When COVID-19 hit and Accounting Aid began doing virtual tax preparation, she jumped back in, eager to be part of the program once more.

"Every Saturday from January through April, four to eight hours a day, I volunteer," she says. "I've tried not to miss a single session. Tax is something I love to do. The only reason I'll get up early on a Saturday is to do taxes for people."

Volunteering year after year also means that Lakshmi is able to get to know her clients, many of whom request her help specifically. "One of the things I'm really lucky to be a part of is the fact that people come back to the same place. You see families and children grow. You see the same people and it's so nice to talk with them and find out what's happened in their lives. It's so nice to see everyone again and again."

“

"You don't have to be a finance or accounting person. Every tax return is reviewed by an experienced person and there are lots of people to help you. If you have an affinity for this and want to do it, then try it out. You will find it extremely satisfying."

- Lakshmi Sundaram, 25-year volunteer



New Fellowship Program Honors Longtime Leader Marshall Hunt

Established through the generous support of Accounting Aid Society donors and friends, the Marshall J. Hunt Fellowship Program was created to cross-train expert staff and build a sustainable pool of talent to continue to help individuals and families in need for generations to come.

The fellowship is given to an individual who embodies the spirit and dedication of Marshall Hunt, who dedicated his life and career to creating just and equitable change and helping those in poverty. Marshall retired from Accounting Aid Society in April 2020, after almost 4 decades as a tax volunteer, board member, staff member and tax instructor.

The first Fellowship Award was given to Chelsea Vitale, VITA Program Manager. As a result, Chelsea began work in the Low Income Tax Clinic (LITC), building a stronger and even more productive connection between the LITC's legal counseling services and the agency's tax preparation program. Through the fellowship, Chelsea is following in the footsteps of Marshall, who has returned nearly a billion dollars to economies across the state of Michigan.

In the five years since she joined Accounting Aid, Chelsea has made an outstanding difference within the organization. In her first year with the agency, Chelsea increased the number of virtual tax returns by 236% through improved marketing, advertising, and site visits. In her current role, she manages more than 25 staff members and oversees a team of volunteers. As an IRS-certified tax preparer herself, she also reviews completed tax returns for quality and accuracy, and coordinates the agency's Homeowner Property Exemption Program to help Detroiters avoid foreclosure. She is currently earning her Enrolled Agent certification.

Detroit-based Love Travels Imports Finds Valued Advice and Partnership

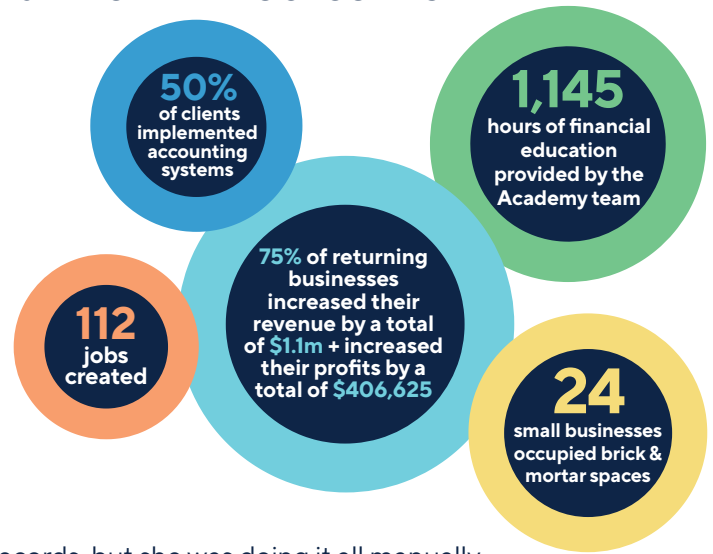
When Yvette Jenkins opened her artisan boutique Love Travels Imports in Detroit in 2012, she had a vision for what she wanted it to be: a place where high-quality crafts from around the world could be offered, all while helping the artisans who make them.

Yvette, who had self-funded Love Travels Imports and was doing well until faced with an unexpected one-two punch that began in 2019 with road construction that limited customer access to her store and grew worse in 2020 with the start of the pandemic.

"I was putting everything I had into the business," says Yvette. "But revenues were drying up, my own personal expenses were getting higher and I was losing hope. That's when I met Maria." Maria Mendez, Accounting Aid Small Business Accountant, has been helping Yvette sustain her labor of love ever since. They meet at least once a month and work together on tasks as varied as documentation and taxes.

Yvette always knew the importance of tracking certain pieces of information and had always kept good

2022 ACADEMY OUTCOMES



records, but she was doing it all manually with Excel. With Maria's help, Yvette adapted new tracking techniques and now better understands how to make data-driven, fact-based decisions.

Then, Omicron's emergence came with its own unique challenges: doubled-shipping costs and halted-flights from Africa. Eager not only to keep her business stocked but also to help the Tanzanian artisans with whom she had contracted, Yvette was ready to agree to alternative transit options which had costs that were "through the roof," but looked to Maria for guidance. "Maria looked at the numbers and said no," Yvette recalls. "And waiting turned out to be a good thing." Yvette was able to negotiate and bring the costs down substantially, solving the problem at a reasonable cost.

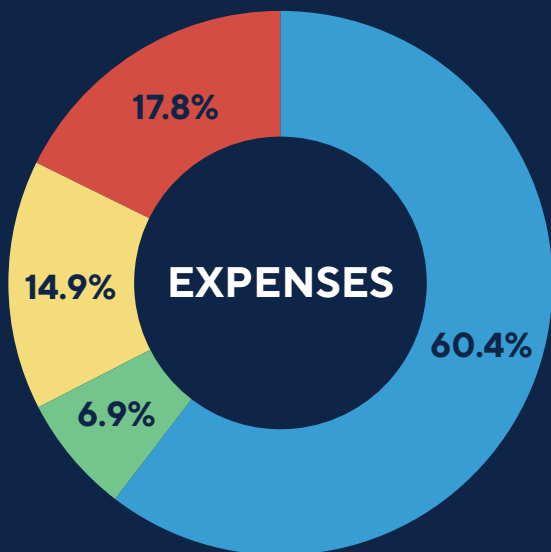
It is that kind of partnership, support and guidance that Yvette appreciates most about Maria, Accounting Aid Society, and the small business program. "I tell people that Accounting Aid is the best, and I've referred a lot of people to a lot of different programs," says Yvette. "It's one of the best things you can do for your business."

The Accounting Aid Academy is wonderful because it not only provides you with information but it is also educational. As a small business owner, you wear many hats and to have someone who can help you (with the financial side of things) is wonderful."

- Yvette Jenkins, Owner, Love Travels Imports.

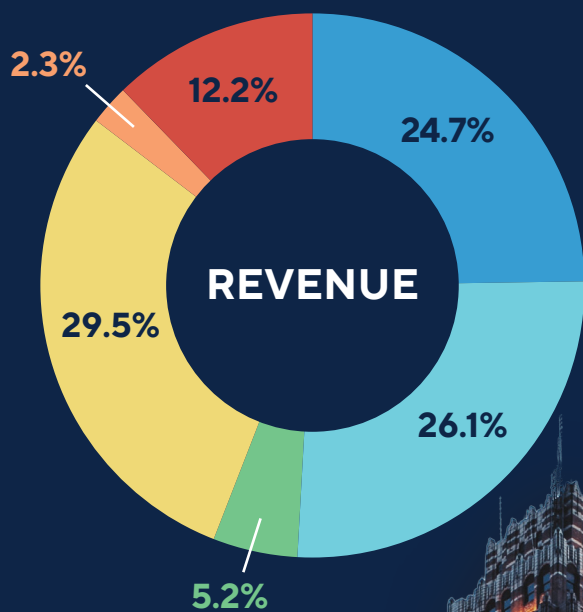
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FINANCIALS*



Expense Categories by Program

- Individual Tax Assistance | **60.4%**
- LITC | **6.9%**
- Accounting Aid Academy | **14.9%**
- Community Engagement | **17.8%**



Revenue = \$3,866,595

- Corporate Funding | **\$958,250**
- Foundation Funding | **\$1,010,541**
- Individual Funding | **\$199,751**
- Government Funding | **\$1,144,950**
- Program Income | **\$89,762**
- Donated Goods & Services | **\$474,436**
- Investments | **\$-11,095**

* Our audit is currently in process.

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