

2023 IMPACT REPORT

Accounting AidSociety SINCE 1972

We use taxes to build relationships.
And relationships to build futures.

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“...our efforts this year are having an impact around the region and the state.”

our efforts this year are having an impact around the region and the state. In March of 2023, the Michigan state legislature voted to approve an increase to the state Earned Income Tax Credit (EITC) from 6% to 30%. Accounting Aid provided state senate testimony in support of increasing the credit, knowing first-hand the difference an average extra \$600 will make to the workers we serve.

Dear Friends:

The 2023 tax season saw the agency reinvigorated. We started out with a rejuvenated volunteer corps, and for the first time since the COVID crisis began, welcomed new volunteers and welcomed back many who were unable to join us during the pandemic. For the first time since 2020, all of our tax sites stayed open for the whole season, giving us the chance to provide tax services to more than 17,000 taxpayers.

The Accounting Aid Academy revved up as well, welcoming a third THRIVE cohort and hosting a bus full of Academy clients and supporters on a tour of small businesses in Detroit that have participated in the THRIVE program and are indeed thriving. The tour helped illuminate not just the agency's return to business but the city itself as well.

Advocacy, outreach, and education are a crucial part of our mission to build an economy that works for everyone, and

Things finally started to feel normal again in 2023, but at Accounting Aid, we give thanks for normal's return and then start looking toward the future with eager visions of growth and innovation. In the coming year, the VITA program will take some first steps into Washtenaw County, and our volunteer corps will grow as we develop new service opportunities for folks who want to share their time and talent with us.

Accounting Aid is grateful to all of you who have supported us through the crisis of the last three years, and we're glad you're with us as we look ahead to the season of possibilities and all the magic we hope to create together on behalf of Michigan's taxpayers.

Sincerely,

Priscilla Perkins
President & CEO



“Accounting Aid’s work is indeed life-changing for thousands across the state of Michigan.”

Dear Accounting Aid Society Stakeholders and Supporters:

It is both an honor and a privilege to serve as the Chair of Accounting Aid Society’s Board of Directors. This position affords me a front-row seat to witness the unwavering dedication and innovative passion exhibited by Accounting Aid’s exceptional staff and volunteers.

Our board of Directors wholeheartedly devotes their talent, time, and resources to Accounting Aid, recognizing the profound difference this organization makes in the lives of individuals, small businesses, and local economies. As you peruse this year’s report, I hope that, like us, you will recognize the extensive and profound impact Accounting Aid Society has on the families, entrepreneurs, and taxpayers of Michigan.

The results speak volumes: from facilitating the return of \$27.5 million in credits and

refunds to taxpayer households and local economies to providing crucial testimony to the Michigan state legislature in advocating for the increase of the state EITC. Accounting Aid’s work is indeed life-changing for thousands across the state of Michigan.

I take immense pride in supporting the remarkable efforts of Accounting Aid Society. I extend this invitation to you: join me in supporting our cause as we eagerly anticipate the 2024 tax season. Together, we aim to establish new tax sites, introduce innovative services, and maintain our unwavering commitment to fostering an inclusive economy that brings opportunity and hope to those who need it the most.

With gratitude,

Jeramey Lynch



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The mission of the 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.



CLIENT SPOTLIGHT

Yolanda Jackson

Low Income Taxpayer Clinic (LITC)

The Accounting Aid Society – Recognized by the IRS, Endorsed by the Clients they Serve

When a fraudulent tax preparer left Yolanda Jackson without a refund – and having to document that tax year with the IRS – the single mother of three young scholars didn't know where to turn for help. Jackson was desperate because she couldn't access the funds she was counting on to continue supporting her three boys, the oldest a student at Michigan State University. When the IRS recognized the problem with the preparer's work, the federal agency referred Jackson to the Accounting Aid Society.

Thanks to the tax professionals at AAS, Jackson now had a supportive team on her side. After diligent work to untangle and document that tax year, she received her refund. This service brought her justice and peace of mind – as well as the financial resource she was relying on.

“I was able to get my car repaired, purchase a car for my son going to college, take care of some back bills, and make some home improvements. It was really a blessing,” she said.

Photo: Yolanda Jackson in front of her home.

CLIENT SPOTLIGHT

Leka, Serenity 824

Accounting Aid Academy:
Thrive Program



Preparation can help with Business Growth

When pandemic shutdowns required Leka Smith to close her budding business, Southfield's Serenity824 Massage Therapy Services, she was suddenly faced with uncertainty about being able to stay in business. Believing in the potential of her passion venture, the veteran massage therapist began searching for financial guidance and found the Accounting Aid Academy's select Thrive business

program. A business novice, Smith received bookkeeping services, mentor connections, and the compassionate, thoughtful step-by-step guidance she needed to succeed. She learned to understand her business, the ebb and flow of her finances, and how to identify and secure funding to help her market and grow her personal service and beauty product business.

Photo: Leka [Left] receiving guidance from Rachel Campbell, E.A. through the Thrive Program.



VOLUNTEER SPOTLIGHT

Brad Cromwell

Volunteer, Accounting Aid Society



Brad Cromwell

The commitment to volunteering time

Volunteers who are willing to give of their time and expertise are essential for the basic operations of the Accounting Aid Society and the service they provide. Tax preparation volunteer Brad Cromwell has stepped up to play this role in the lives of those who are counting on their tax refunds to fund needed expenses. Almost a decade ago he decided to take the organization's tax law training and passed the test to be able to prepare taxes so that he could give back to the community. He's able to truly impact the quality of life for the low-income families who seek out Accounting Aid Society support. He says he loves the work environment, helpful staff and even the volunteer snacks – but it all pales in comparison to securing cash for the hardworking people who are depending on his assistance with getting a tax refund.





Maria Mendez

STAFF SPOTLIGHT

Maria Mendez Wins TechTown’s Marlowe Stoudamire Small Business Champion Award

Small Business Accountant, Accounting Aid Society

A daughter of a business owner, the Accounting Aid Society’s Senior Small Business Accountant Maria Mendez says, “There is a ripple effect when you are supporting a small business because you are supporting a family and a community.” She therefore serves each client with diligence and empathy, empowering them with the skills and confidence they need to build successful businesses.

The mission of the Accounting Aid Society is to provide economic stability for everyone through free tax assistance and financial guidance. Maria has been providing tax services to families and small business owners for more than 15 years, working primarily with metro Detroit’s Spanish-speaking community. This means she is working to dismantle and overcome systems and structures that have historically excluded underserved populations. She regularly partners with TechTown and other business service organizations to do so, catalyzing community business growth.

Marlowe Stoudamire was a stellar Detroiter who championed entrepreneurship and economic development in the city, passing at age 43 at the beginning of the pandemic. Maria was selected for the award in his name because her dedication to advocating for small businesses exemplifies Stoudamire’s spirit of collaboration.



2023
PROGRAM
FINANCIALS*

TOTAL REVENUE
\$4,429,212

EXPENSE
CATEGORIES
BY PROGRAM

\$1,378,313
Government
Funding

63.8%
Individual Tax
Assistance

\$1,314,765
Foundation
Funding

\$829,025
Corporate Funding

13.6%
Community
Engagement

\$509,466
Donated Goods
& Professional
Services

11.8%
Accounting Aid
Academy

\$194,153
Individual Funding

\$182,920
Program Income

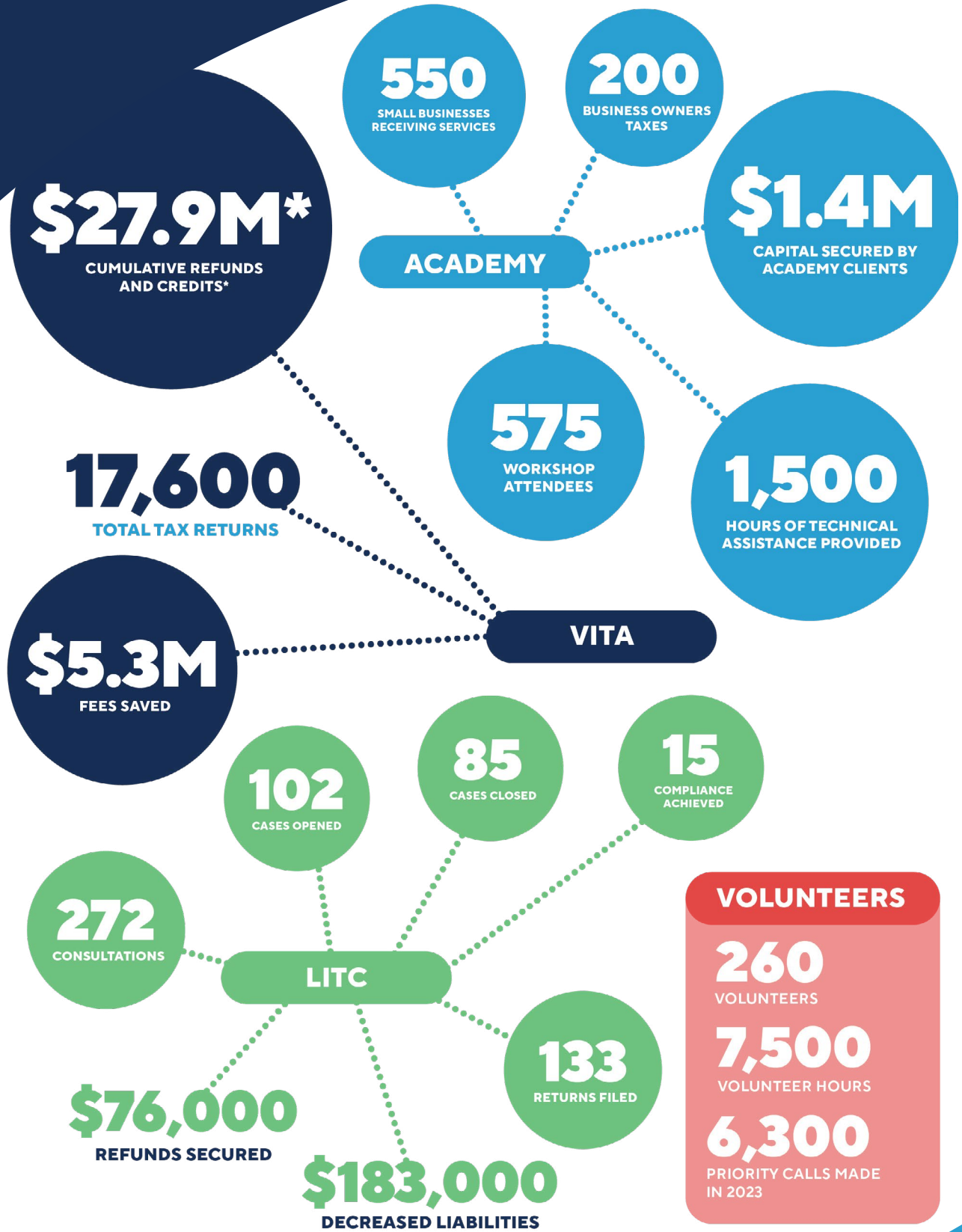
\$20,570
Investments

10.7%
LITC

* Unaudited Statements

2023

PROGRAM METRICS*



* Includes 2022 delayed State EITC.

2023

FUNDERS

ACI Transport
Ally
CIBC
Citizens Bank
Clark Hill PLC
Comerica Bank
Corewell Health
Delta Dental of Michigan
DTE Energy
Ernst & Young, LLP
Fifth Third Bank
First Merchants Bank
Flagstar Bank
Ford Motor Company
Franskoviak Tax Solutions
GJC CPA'S & ADVISORS
JPMorgan Chase
KPMG LLP
Lear Corp.
M. Jevahirian & Co.
Masco Corporation
Michigan Association of CPAs
MotorCity Casino Hotel
Oxford Bank

Plante Moran
PNC Bank
Siebert Williams Shank & CO. LLC
The Non-Profit Personnel Network, Inc
AARP Foundation
ACCESS
AmazonSmile Foundation
The Community Economic Development Association of Michigan
Community Foundation For Southeast Michigan
Intuit Financial Freedom Foundation
The Kresge Foundation
The Mary Thompson Foundation
McGregor Fund
Michigan State Bar Foundation
New Economy Initiative for Southeastern Michigan

Oakland Livingston Human Service Agency
Pontiac Community Foundation
ProsperUS Detroit Micro Lending
Ram and Lakshmi Sundaram Foundation
Rocket Community Fund
The Skillman Foundation
State Bar of Michigan
The Elizabeth, Allan & Warren Shelden Fund
The Vera and Joseph Dresner Foundation
United Way for Southeastern Michigan
City of Detroit
Internal Revenue Service
IRS Low Income Taxpayer Clinic

2023

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Bob Cahalan
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Jason Cooper
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2023

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Kelli Murphy
Kevin Murphy
Gregory Nowak
Rick & Suzanne Pacynski
David Parham
Randolph Paschke
Priscilla Perkins
Huel Perkins
John Purtill
Nick Quigley

Bill Quigley
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David & Karen Rehrauer
Patricia Rencher
Robert & Kathleen
Rosowski
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Alex Schwallbach
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Darlene Shaughnessy
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Carol Singer
Lakeisha Sledge
Ronald Spinner
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James Straith
Lakshmi Sundaram
Julie M. Telang
Ramesh Telang
Gabrielle Thomas
Daniel Todd
Jessica Toth
Roger Towne
Tadashi Tsukuda
William Walker
Janise Wellington
Daniel Williams
Alan C. Young
Robert Zalewski
Mary Zatina



2023

VOLUNTEERS



Ciera Abiakam
Camery Abram
Laith Abuseneh
Luz Acosta
Ethan Adams
Jessica Addy
Dawn Aginian
Hugo Aguinaga
Aladeen Alashmli
Linda Ali
Noor Al-khafaji
Abdullah Ahmed Almutawakel
Lamis Alnajjar
Rayan Alsayedali
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Cranstana Gina Anderson
Julia Andre
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Ronilda Arcani-Mallea
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Sharea Ayers
Emilee Baker
Meena Balakrishnan
Adriana Barajas-Garcia
Michael Bastien
Alan Baum
Sarah Bendit
Wanda Black
Brenda Bonilla-Martinez
Brian Bonnell
David Boudreau
Kat Bounds
Deirdre Bowie
Rhonda Brown
Susan Callahan
Catherine Campbell
Lisa Campbell
Michele Chakmakian
William Chase
Nina Cheaib
Hong Chen
Cynthia Churches
Donna Clay
Carl Corman
William Courtney
Brian Crabtree
Brad Cromwell
Sofia Cueva

Maya Dakroub
Bhushan Dandekar
Manav Das
Priyanka Das
Jeanne David
Rami Debouk
Joseph Dennison
Fatima Dergham
Heather DiNunzio
Stacie Durant
Bruce Dziadzio
Richard Dziadzio
LaTonya Edwards
Janet Elbert
Lew Elbert
Ali Elhellani
Hassan Elsayed
Donna England
Emily Ersher
Richard Eusani
Batoul Fardous
Rosalinda Favila-Govea
Jose Flores
Tony Flores-Padilla
Jon Flott
Brian Foster
Maria Dolores Fraga Camarena
Steven Fuja
Susan Gainer
Colette Galayda
Bianca Garcia
Luis Garcia
Jenna Gayle
Nichole Gilbert
Ed Golick
Luis Gonzalez
Colleena Graf
Danielle Griffin
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Jonathan Guevara
Bridget Hale
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Michelle Hargrave-Denton
Oliver Hayes
Tanya Heaphy
Nathan Helmick
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Matt Hetherwick
Barbara Heyser
Brittany Hobbs
Joshua Hoenscheid
Doug Holmes
Fisher Hudak
Marshall Hunt
Linda Hynes
Sherri Johnson
Andrew Jordan
Amelia Kaindl
David Kalis
Vandana Karmani
Eilish Keating
Peter Keating
Samantha Keller
Bruce Kennedy
Salihom Kidane
Veronica King
Noor Kleib
Jay Kleiman
Gerald Klimek
Carol Kranz
Anne Kraus
Kelly Lepper
George Linker
Thomas Linn
David Littlefield
Kyle Loken
Tiffany Long
Lila Lowe
Mark Maisonneuve
Leslie Malcolmson
Peter Malcolmson
Lynda Marchetti
James Marrow
Angela Martin
Susan Martin
Elizabeth Martinez
Allen Anesh Mathew
Kyla Matthews
Emilia Mauck
Charles McCarthy
Brooklyn McDowell

2023

VOLUNTEERS



Michelle McKie
Khalel Meflehi
Jose Messina
Maxine Mickens
Sandra Montes
William Morris
Nancy Mukuri
Kevin Murphy
Christina Nguyen
Matthew Novak
Mike Novak
Daniel Nyquist
Jon Oatley
Emmanuel Ojomolade
Julie Oldham
Donna Opthoff
William Ortiz
Shay Owens
Rick Pacynski
Rebeca Padgett
Bhavna Patel
Maureen Patel
Neha Patel
Suresh Patel
Travis Pearce
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Huel Perkins
Priscilla Perkins
Anthony Perna
Jeff Perry
Michael Pfromm
Joseph Pia
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Michael Reichenbach
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Mariana Romero-Martinez
Marsha Rowry
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Robert Samples
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Sofia Scott
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Justin Paolo Segovia
Ramesh Sethu
Maher Shagera
Bing Shuttlewood
Jonathan Shuttlewood
Ali Siddiqui
Mireya Silva
Dae'Lon Simmond
Taranjot Singh

Joyce Smith
Rashara Smith
Denise Smith-McGee
Michael Sovran
Ron Spinner
Jamison Spring
Katherine Stokes
Shaunetta Stokes
Larenz Stoudemire
Lisa Stroud
Gabe Sucevic
Leon Sun
Michael Svestka
Autumn Tashman
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Kevin Todd
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Ramiro Urista
Erika Valenzuela
Xochitl VanderPlas
Chelsea Vitale
Sarah Walker
Nancy Walocko
Doug Ware
Karlnelia Williams
Noah Wojcik
Johinnie Worrell
Greg Wright
Fang Yang
Rong Yao
Mindy Zheng
Rene Ziaja
Fatima Zorkot





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And relationships to build futures.**