

# **Client Stories Make the Difference**

## **Tell us your story and be entered in to win a \$50 gift card!\***

### **Did you know that you can help others by telling your story?**

Michigan families like yours benefit from credits such as the Earned Income Tax Credit and free tax-filing services and we need your help in spreading the word about these benefits. If you are willing to tell your story to others – in printed materials, video interviews or speaking with reporters and policymakers – please fill out the form below and return it to the front desk or your volunteer tax preparer.

While we do ask for your contact information only the answers you provide to the questions on the form, your first name and first initial of your last name, city or location of free tax services will be used should we choose to publish your story. The use of other identifiable information will not be used unless you agree to allow us to do so in any follow-up communication. Only respond to the questions with information you feel comfortable sharing with others about any refund or tax service you received. Please be aware that while we will not share your personal contact information with others outside of the MEIC, it is necessary to correctly provide us accurate contact information so that we may contact you with any follow-up questions regarding your story, or if you are selected to win one of the gift cards.

In order for your story to be used to let others know about benefits of the Earned Income Tax Credit and volunteer income tax assistance services like this, please sign both IRS forms on the following page to allow us to “use” and “disclose” your information so that a volunteer of the Michigan EITC Coalition can contact you.

### **Personal Information**

**Name:** \_\_\_\_\_

**Phone:** ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ **email:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Check the following that apply:**

None apply to me

- Received EITC     Rec'd Child Tax Credit     Rec'd Heating Credit     Rec'd Property Tax Credit  
 Did not receive any refund     Split my refund into 2 or more accounts     Saved a portion of my refund

**What is your occupation?** \_\_\_\_\_

**How did you hear about the free tax service?** \_\_\_\_\_

**Is this your first time using the free tax program? Yes or No**

**If your answer is yes, how did you prepare your taxes last year?** \_\_\_\_\_

**If your answer is no, how many years have you been using this service?** \_\_\_\_\_

**Tax Site Location:** \_\_\_\_\_ **Volunteer Preparer:** \_\_\_\_\_

\*Chances to win are based on how many clients fill out a form. Winners will receive one \$50 gift card. By completing this form, you agree to be contacted by CEDAM or the Michigan League for Public Policy for an interview about your story whether or not you win the gift card. For more information, or to fill this our online, go to: [www.MichiganFreeTaxHelp.org](http://www.MichiganFreeTaxHelp.org)

# Client Story

Client Name: \_\_\_\_\_

\*Please respond to the following questions. If you need more space for any answer, there is extra space provide on page 4. If you do not wish to respond to a question, please leave the space blank.

## How do you plan to use any state or federal refund that you receive?

(please check all that apply)

- I am NOT receiving a refund this year
- I will use it to pay for general household expenses like furniture, mattresses, new clothes, etc.
- I will use it to pay for utility bills like heat, electric and water
- I will use it to pay for basic household expenses like groceries, medication, etc.
- I have some overdue bills and will use it to get caught up
- I will use it to pay my property tax bill
- Other

If you answered "other" please describe: \_\_\_\_\_

\_\_\_\_\_  
**Please tell us about your experience at the free tax preparation assistance site. How did it help you? Was this your first time going? Would you recommend this service to friends and family?**

\_\_\_\_\_  
**What would you like to share with others (including lawmakers) about the free tax services you received? Does this program have any value to you, your family and the community?**

\_\_\_\_\_  
**What do you wish to share with others (including lawmakers) about refundable credits like the EITC? Do they help and, if so, how do they help?**

\_\_\_\_\_  
**What do you wish to share with others (including lawmakers) about the challenges and issues you (and your family, neighbors or community) face every day?**

\_\_\_\_\_  
**Is there anything else you wish to share with us?**

**CONSENT TO USE:**

Federal law requires this consent form be provided to you before any of your personal information is used. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation of your tax return.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

By signing this form, you consent to allow us to use your name, occupation and answers to the questions on page two of this document in advocacy and promotional materials for members of the general public, policymakers and the media on volunteer income tax assistance and tax credits like the Earned Income Tax Credit. Your signature also provides consent to allow a member of the Michigan Economic Impact Coalition to contact you to discuss the information provided by you on pages one through four of this document and your experience with the free tax preparation services provided to you by the volunteer income tax assistance program.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

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Tax Payer Signature

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Today's Date

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Tax Payer Name (please print)

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Consent valid until above date  
If no date is specified, your consent will  
be valid for 1 year from today's date

**CONSENT TO DISCLOSE:**

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

By signing this form, you consent to allow us to disclose your name, occupation and answers to the questions on pages one through four of this document to representatives of the Michigan Economic Impact Coalition so that they may contact you to discuss the information provided by you on these pages this document and your experience with the free tax preparation services provided to you by the volunteer income tax assistance program. Your signature also provides consent to allow us to disclose your name, occupation and answers to the questions on pages one through four of this document to policymakers, the media and in advocacy and promotional materials on volunteer income tax assistance and tax credits like the Earned Income Tax Credit.

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