

**A FEW
POINTS OF
INTEREST:**

- We served more local taxpayers than ever before! Read on for the numbers
- CASH Oregon welcomes two new board members
- The taxpayer survey results are in! See what we learned inside

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ANOTHER SUCCESSFUL YEAR

2008 tax season numbers show more impressive growth

Every new tax season in the brief history of CASH Oregon has been marked by an increase in the number of taxpayers we serve and the amount of federal refund dollars we help bring back to the community. This year was no exception.

Along with our partners at **AARP Tax-Aide**, we were able to reach nearly 15,000 low- and

middle-income families and individuals throughout Washington, Multnomah, and Clackamas counties. That number represents an increase of over 11 percent for 2009 after seeing a 9 percent jump the year before.

Much of the growth can be attributed to our continued success at the Lloyd Center super-site. In fact, Lloyd Center officially assumed the title of “largest

free tax preparation site in the entire state of Oregon” this year! More than 1,800 tax returns were filed by April 15th—and the site will remain open at least once a month throughout the summer.

We also helped taxpayers claim more federal refund dollars in Washington and Clackamas counties for the fourth consecutive year.



Volunteering on Super Saturday

None of our success would be possible if not for the incredible dedication of AARP/CASH Oregon volunteers. This year alone, almost 300 volunteers gave more than 18,000 hours of their time to power our free tax preparation sites. We would like to thank each one of you for your tremendous commitment!

A LOOK AT THE NUMBERS		
Washington	2008*	2009
Returns	3,902	4,646
Federal refund	\$3,931,516	\$5,353,145
Multnomah	2008*	2009
Returns	6,875	7,904
Federal refund	\$6,021,000	\$8,694,348
Clackamas	2008*	2009
Returns	2,161	2,100
Federal refund	\$1,445,497	\$1,701,471
Tri-county total	2008*	2009
Returns	12,938	14,650
Federal refund	\$11,398,013	\$15,748,964

*Adjusted for IRS-estimated 20% stimulus returns

Forum Elects New Board Members

Two new members were elected to the CASH Oregon Board of Directors at our May 15th annual meeting. Nearly thirty community partners from the tri-county area showed their support by unanimously confirming **Thomas Jensen** of CASA of Oregon and **Sandra Perez** of Catholic Charities.

The addition of both Thomas and Sandra represents a big step forward for CASH Oregon. They bring with them specialized skill sets that will help us reach deeper into our target communities and expand our free services to better promote financial health for working families and individuals.

Thomas serves as the Director of Asset Development at CASA. He has spent years helping families and individuals start matched savings accounts to earn money for education, small business development, and first-time home ownership. Before CASA, Thomas managed a successful program for Mercy Corps NW

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2009 Taxpayer Survey Results



A family of taxpayers

Every year we survey taxpayers at the Lloyd Center site to get a better sense of the people in our community taking advantage of CASH Oregon's free tax preparation services.

We use this information to improve our service and outreach efforts in many of the underserved communities in the tri-county area. This year's survey indicated that we are succeeding on many counts.

First, the taxpayers who came to Lloyd Center were a more diverse group than ever before. The percentage of non-white taxpayers continued to rise for a third straight year.

Also, we helped more low-income families claim the Child Tax Credit than years past. Both the number of returns and dollar amount rose significantly in 2009.

We hope to build on our tremendous progress in 2010.

HIGHLIGHTS

- **69%** of taxpayers at Lloyd Center self-identified as non-white
- The average Adjusted Gross Income was **\$21,885**
- We filed **31%** more Child Tax Credit returns worth **\$604,800**, an amount up almost **35%**
- Nearly **half** were returning taxpayers

Thinking 2010

Interested in volunteering next year? Now is a great time to get in contact with Camille!

Year-End Volunteer Party A Hit

On April 16th, we hosted the annual volunteer party at the Doubletree Hotel near Lloyd Center. Activities included a raffle full of great donated prizes, another year of Tax Jeopardy, and an opportunity to recognize our longest-

serving volunteers.

Volunteers in attendance were also treated to a buffet-style dinner followed by tax-themed cakes for desert. A merry time was certainly had by all!

See you all next year!



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CASH Oregon is a community based non-profit organization formed to improve the financial health of working individuals and families. We promote federal and state Earned Income Tax Credits, provide free tax preparation in partnership with AARP Tax-Aide, and we are piloting a financial advocacy and education program.

CASH OREGON
Camille McDaniel, Volunteer Coordinator
Thomas Kost, Financial Advocacy
Paul Ziezulewicz, AmeriCorps*VISTA

AARP TAX-AIDE
Gwen Williams, State Director
Bill Ensign, District Coordinator
Tom Fisher, District Coordinator

Board Members cont.

that helped low-income business owners and entrepreneurs in Portland.

Sandra manages the Low-Income Taxpayer Clinic at El Programa Hispano. She has experienced enormous success assisting the Latino community in the Portland area, something we are committed to here at CASH Oregon. Sandra previously served in her native Colombia as an auditor, director, and CFO with different government agencies.