

# Disability Initiative Talking Points

FOR RELATIONSHIP MANAGERS IN STAKEHOLDER PARTNERSHIPS, EDUCATION AND COMMUNICATION (SPEC) FOR USE WITH PARTNERS

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## Key Messages

- The IRS is reaching out to the disabled community through local and national partnerships with disability organizations.
- National and community partnerships are key enablers to strategic implementation.
- Through our community based model we will establish local campaigns that deliver free tax preparation service, financial literacy and asset-building strategies to the disabled community.
- One of our goals is to educate people with disabilities on tax credits and deductions they may be eligible for and how these may affect other benefits they receive such as SSI/SSDI, etc.
- **2006 Filing Season Impact:**
  - More than 17,000 persons with disabilities received free tax preparation services; an increase of over 330% from 2005.

*These talking points are intended to give SPEC employees the information they need to advise current and potential partners regarding the Disability Initiative.*

## What is the Disability Initiative?

The SPEC Disability Initiative educates taxpayers with disabilities on available tax credits, deductions, and free tax help. It also increases their understanding of and access to community-based asset-building and financial literacy resources to help improve their economic well-being.

## What is our Strategy?

SPEC will collaborate fully with the National Disability Institute (NDI) through their *TaxFacts+* Campaign. This Campaign is a national initiative delivering financial education and tax preparation services to low-income persons with disabilities in more than 100 U.S. cities over the upcoming years.

Expand the reach of existing community-based coalitions in selected cities by targeting efforts to include national and local disability organizations into existing coalition efforts around education/outreach, free tax preparation services and asset-building opportunities.

Develop and implement unique marketing plans to educate and inform low-income persons with disabilities about tax credits and deductions they are entitled to.

## What are our Goals?

- Educate and inform persons with disabilities and the organizations that serve them regarding the interaction of public benefits and the receipt of federal tax credits and benefits (including Earned Income Tax Credit).
- Fully integrate persons with disabilities into all existing free tax preparation services by ensuring that all sites are fully accessible and accommodating.
- Provide access to asset-building opportunities.