



tax & financial services
for those in need



Celebrating 40 Years of Building Economic Security

2012 Annual Report

Dear Friends,

AccountAbility Minnesota (AAM) was founded 40 years ago by a group of accountants with a seemingly simple but powerful conviction – a person’s ability to pay for tax and financial assistance should not depend upon their ability to pay for it. Over the years we have helped tens of thousands of hardworking families access the tax refunds they have earned – refunds that make a real difference in their lives. In this report, you will read first-hand accounts of what tax refunds and our services mean.

Tax credits provide a significant income boost for many low- and moderate-income families. Today, nearly one in five tax filers receives the Earned Income Tax Credit (EITC), which is considered to be this nation’s largest anti-poverty program for working families.

Research, our own experience, and the stories of our customers all show that the vast majority of EITC recipients spend their refund on bills and current expenses. Our charge at AAM is to ensure that we maximize the refunds our customers have earned, and provide concrete ways to help them save a portion of those refunds. Bills and basic needs are going to trump saving. But saving a small amount can make a difference – to provide a cushion for emergencies, build a savings habit, and create a better future for tomorrow’s children.

In this 2012 annual report we feature the voices of our customers, volunteers and partners. You’ll read about the impact of our work through their stories. You’ll also see our results from 2012 and our efforts to engage more people – volunteers, donors, partners and customers – in the work to provide free tax and asset building services.

Additionally in 2012 we conducted an extensive strategic planning process. We are excited to launch the our new strategic plan in 2013. You can access a copy of it at www.accountabilitymn.org.

We have made real progress over the last 40 years and look to the future with an ambitious plan to help individuals and families achieve long-lasting financial stability. We will continue to strive to meet the growing demand for our services while remaining nimble, focused, and grounded in our mission.

Tracy Fischman
Executive Director

Kirsten Anderson
Board Chair





For Patricia, our services make a "significant difference financially"

"You live and you learn," was Patricia's response when asked why she chose to come back to AAM, after going to a paid preparer last year.

Patricia came to AAM in 2010, but decided to go with a paid preparer in 2011, in hopes of getting a faster refund. As a result, she had to pay over \$300 in filing fees. Contrary to what some may think, paid preparers do not file

taxes any faster than free sites when filing electronically and direct depositing refunds.

"[At AAM], you get professional service, keep 100% of your refund and it is all free! For families like ours it makes a significant difference financially," said Patricia.

Patricia received about \$4,000 in refunds, which she plans to put towards getting her ten-year-old daughter braces. "My savings, in combination with my refund this year, means she gets her braces sooner than later." Our customers often times spend their refunds on necessities like paying bills, covering health costs and saving.

Patricia also has a 19-year-old daughter, Desireé, whom she brought with so that she could do her taxes for the first time. Not only did Desireé file, but she was able to save a significant amount, too. "I'm excited to be doing this for the first time, and even more excited to be saving."

Desireé, like many of our customers, is also a great advocate for our work. She told us she's eager to spread the word about free tax preparation to her friends, because "as a college student, you need all the help you can get."

2012 Taxpayer Services Highlights

- **12,445 low- and moderate-income taxpayers** received free tax preparation.
- **\$22.6 million in tax refunds** were put directly into the pockets of low- and moderate-income, hardworking families.
- **6,020 children** benefited from tax refunds.



Using tax refunds to build a savings cushion

Tamika, a mother of three boys, went from being homeless in 2009 to living in a townhouse within four years. “It didn’t matter if it meant working for minimum wage or part-time, I had to do it for my boys.” Juggling work, school and taking care of her family, Tamika earned her certification as an IV technician.

Tamika works incredibly hard for her money, is vigilant about her finances, and chooses AccountAbility Minnesota to help her with her taxes so that she can maximize their impact on her financial future.

“I don’t really care for paid preparers because I can make their fee (typically \$300) go a long way for my boys and me.” she said. Last year Tamika was eligible for the Earned Income Tax Credit and got to keep all of it because she came to a free tax preparation site.

As the sole provider of her family, saving – particularly having a three month cushion – is important to Tamika. “I always put more than 75% of my refund in what I call my super savings account.” Tamika has also started a college fund for her oldest son, because she wants him to go to school without having to take out too much in loans.

Tamika is also a big fan of AAM’s financial services. “When I first came to AAM, I needed to pull my credit report. They helped me go through and understand my report, which is when I found out I was victim of identity theft. It took a year and a half to straighten it out and repair her credit. This is why I love AAM, it’s a one stop shop for most things finance-related.”

2012 Financial Services Highlights

- **179 new credit union and bank savings accounts and 602 prepaid debit cards** were opened for our customers regardless of their banking or credit history.
- **\$25,450 in U.S. savings bonds** were purchased by our customers with their refunds directly through their federal tax return form.
- **1,105 taxpayers** had their credit report pulled and received information on how to improve it.
- **1,061 taxpayers were screened for work support programs** with the Children’s Defense Fund’s Bridge to Benefits online screening tool. Help with food, health and energy costs frees up money for use on other necessities.



Helping small businesses to thrive

Javier heard about AAM from a friend who had come here to get help with taxes. Javier, a self-employed interpreter, needed help getting his tax situation back on track. Javier, originally from Peru, has been living and working in the United States for nine years and, before finding us, struggled to navigate the tax system. As an interpreter Javier receives payment for his services in several methods – cash and checks – and found it hard to keep track of his income and expenses, thus meet his tax obligations and run a healthy business.

2012 Self Employment Program Highlights

- **795 sole-proprietors** received free tax preparation.
- **18 self-employment volunteers received specialized** training for more complex tax situations and issues that small business owners face.
- **45 self-employed individuals participated in one of our 6 educational workshops** that covered financial basics and taxes.
- Our self-employed customers' occupations range from photographer to carpenter to tow-truck driver to pet groomer.

Along with help in straightening out his tax situation, Javier wanted education on how to better manage his business going forward to avoid falling behind again. Javier worked with Tom Larson, AAM's self-employment program manager, to better understand the tax system and what was required of him as a small business owner. As a result of his involvement with AAM, Javier now fully understands the value of a healthy tax situation and is equipped with the education, tools and resources he needs to manage his taxes and his business in a more successful way.

"AccountAbility Minnesota helps to open doors," said Javier. "They give you education. They teach you how to take care of your finances and how to not get into trouble by not doing what you're supposed to do."

Javier's wife Sarah added "We can't pay an accountant a couple hundred dollars to do it. And for us to do it by ourselves, there could be mistakes. It is valuable for people who don't have the knowledge or the money."

AAM has been assisting small business owners since it's inception in 1971. Our customer base is wide and professions served range from photographer to carpenter to tow-truck driver to pet groomer.

Offering assistance to free tax providers across the state

West Central Minnesota Community Action (WCMCA) has been running free tax preparation – or Volunteer Income Tax Assistance (VITA) – sites since 2005. They’ve benefitted from AAM’s training and technical assistance (TA) and guidance over the years, particularly through staff transition.

Last year, Heather Thormodson, a WCMCA staff member, took over the free tax preparation program with, as she readily admits, no tax preparation experience.

“It was exciting but scary at the same time to oversee tax preparation when I’d never done taxes before. This program is invaluable to our community and AAM’s help to get up to speed has been invaluable to me,” said Heather.

As she began planning for the 2012 tax season, Heather heavily relied on AAM’s training and technical assistance. The previous site coordinator had left before Heather began working with the program, so AAM’s TA manager, Erin Severson, stayed in close contact with Heather to make sure WCMCA was on track to have another successful season. Once the season started, Erin visited their sites in Elbow Lake and Alexandria.

Along with AAM’s guidance, Heather developed a small group of trusted volunteers to advise her on how their program has run in the past and where there is room for improvement.

“AAM educated me on site coordination, IRS requirements, and taxpayer materials. Their depth and breadth of expertise is impressive. If you are new to the world of free tax preparation...you will want to have AAM as a part of your toolbox for success,” said Heather.

The 2012 tax season proved to be a difficult but highly rewarding tax season for WCMCA, Heather, and her volunteers. They ended the season with over 1,300 state and federal returns prepared, keeping up with numbers from past years and exceeding Heather’s expectations. Since that season, Heather has continued to utilize our technical assistance program and is “forever grateful we were there when she needed it.”

Through its TA program, AAM is helping to increase access to tax and financial services for low- to moderate-income taxpayers living across the state, particularly in rural or remote areas.

Heather pictured at far right.



2012 Training and Technical Assistance Program Highlights

- **11 organizations across the state** received training and technical assistance and operated **21** free tax preparation sites.
- **9 of the 11 organizations increased the number of federal returns** their volunteers prepared and filed.
- Lakes & Pines Community Action Council opened an additional site in McGregor, MN and increased the number of returns prepared by 35%.
- Tri-County Action Program had 22 more volunteers assisting during the 2012 season than in the prior year; volunteers contributed 3,216 hours in 2012.

Volunteering to make an impact on community

Father-and-son duo Satya and Sylesh are unique volunteers. Not only are they one of a handful of “family teams” that volunteer at AAM but Sylesh is the youngest volunteer tax preparer. He is a senior in high school but you’d never know that meeting him.

“We were unsure if AAM would let me volunteer because I was still in high school but they were open to it and I’m very glad,” said Sylesh. “I’ve volunteered before but my service at AAM is more fulfilling because I feel like I’m making a larger impact on our community.”

Both Sylesh and Satya have been volunteering with AAM for three years. Satya first heard about the opportunity through an email at work. He enlisted his son, Sylesh, to get involved with him.

“I saw an opportunity for us to do something together and to help the community at the same time – something we are both passionate about,” said Satya.

Satya and Sylesh both enjoy the challenge of learning about our complicated tax system and how it impacts hardworking families. They say it’s great to be able to volunteer their time to a cause that really benefits from their expertise – not everyone has a passion for and talent in taxes.

In addition to volunteering their time, Satya and Sylesh also give financially. Sylesh says part of his allowance goes to AAM every year.

Sylesh will be graduating soon and will study either political science or computer programming but promises AAM that he will keep preparing taxes for free here or somewhere near his university.



2012 Volunteer Highlights

- **553 volunteers** gave **19,192 hours** to prepare **26,339 tax returns**.
- Each volunteer tax preparer went through **nearly 20 hours of training and passed exams** to become IRS-certified to prepare taxes for free.
- Our longest-standing volunteer has been with us since the early 1970s.

The Earned Income Tax Credit keeps families on track

As an independent contractor, and third-generation carpenter, Scott is usually at the mercy of the economy. When the housing market slows, so does his work load. “My bills are paid off today, but I need to pay them again next month.”

In a very real way, the Earned Income Tax Credit’s (EITC) value to Scott’s family can’t be overstated. “It’s a nerve-racking day to come to do taxes and wonder if the Earned Income Tax Credit and the Child Tax Credit are going to be there for us.” Scott shared, “If it was taken away, I simply could not continue to own a small business.”

While the EITC helps take care of basic needs such as food for the family, Scott also knows the benefits of the EITC extend beyond his own family. “Part of the refund goes towards paying for my re-licensure and continuing education; which means I help put money back into the community.”

Scott hopes that others can understand how important the EITC is. “I’d like to think that I’m not dependent on the EITC, and in some years I’ll make enough to owe taxes, which I’m happy to do.”

But if we didn’t have the EITC, it would be very difficult for us. It’s happened before where we’ve missed two mortgage payments and scrambled to get back on track. This is a great program, especially for this family,” said Scott.



2012 Claim it! Campaign Highlights

- Underwent a full rebranding process and established a new logo, tag line “It’s your money!”, and messaging “You earned it! You claim it!”
- Shipped more than 250 packages of Claim it! materials to organizations in over 100 Minnesota cities to spread the word about the EITC and free tax assistance.

Celebrating 40 years of service

On September 27, we marked 40 years with a celebration, “40 Years and Counting,” on the old trading floor of Minneapolis’s historic Grain Exchange Building.

It was a memorable evening of good food, great company, a silent auction, and a program emceed by broadcast veterans Trisha Volpe and Bob McNaney with remarks from Minnesota Department of Revenue Commissioner Myron Frans, Board Chair Kirsten Anderson and Executive Director Tracy Fischman.

We raised \$7,000 at the event. With ticket sales and sponsorships, we raised more than \$43,000 for our work.



AccountAbility Minnesota was founded 40 years ago by a small group of social justice-minded accountants who believed that one’s access to quality tax services should not be determined by ability to pay. With this seemingly simple but powerful conviction, AccountAbility Minnesota has flourished over the years, leveraging the help of thousands of volunteers to help tens of thousands of hardworking families access the tax refunds they need to make ends meet and build financial security.

Jim Dodge and a group of justice-minded accountants founded the organization, then named Minnesota Accounting Aid Society.

Began providing free tax assistance to individuals in addition to sole-proprietors.

Served 700 customers, returning \$275,000 in refunds with the help of 118 volunteers.

Changed our name to AccountAbility Minnesota.

Served 6,229 customers, returning \$6.3 million in refunds with the help of 276 volunteers, 5 seasonal staff, and 3 full-time staff.

Stopped filing primarily by paper returns and used computers instead.

Launched our financial services.

Served 12,445 customers, returning \$22.6 million in refunds with the help of 553 volunteers, 30 seasonal staff, and 13 full-time staff.

1971

1975

1978

1999

2001

2006

2012

Engaging more people in the work to foster economic security

- In April, **we assumed day-to-day management of the statewide Claim it! campaign.** Working closely with the Greater Twin Cities United Way (who created the campaign), we're playing a statewide leadership role in helping to increase access to the Earned Income Tax Credit and free tax preparation. Nearly 250 organizations in 100 cities across Minnesota are involved in the campaign.
- **We engaged more customers in helping us shape our work.** We conducted a series of customer focus groups to get input on what matters most when it comes to tax preparation and saving. Their feedback informed our marketing messages for both the Claim it! campaign and our savings campaign, "Got Some, Save Some," which we rolled out in 2013.

Tracy Fischman, Nan Madden, Baird Helgeson



- **We hosted our first event in the AAM Forum series.** Baird Helgeson, Star Tribune reporter, and Nan Madden, Minnesota Budget Project director, participated in a lively discussion facilitated by Executive Director Tracy Fischman on tax reform and the implications it holds for low-income people. The AAM Forum series is a series of education events designed to initiate learning and conversations around issues important to the economic realities of the people we serve.
- After tax season, **we hosted a statewide debrief meeting.** More than a dozen free tax preparation providers from across Minnesota came together for one day to share successful practices, opportunities for improvement, and collectively provide feedback to the Internal Revenue Service.
- **We launched our first-ever volunteer fundraising campaign, 4@\$40.** We challenged volunteers to get 4 people to donate \$40 in honor of our 40th year. Nearly 100 volunteers participated bringing in 301 gifts totaling more than \$21,000.
- **On November 16's Give to the Max Day we raised a record number of donations for individuals – \$34,000.** A group of our volunteers and donors came together to create a matching fund of \$14,000. We matched that fund and more with an additional \$20,000 in donations from 273 donors.

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\$100,000 and above

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Internal Revenue Service – Volunteer Income Tax Assistance Program
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Pearly Cook	John A. Gaichas	Jordan Kelly	Guy Mattson	Christopher Popovich	Kathleen Streib	
	Carla Gainey	Gene Kenney	Mary Jo Maynes	Cindi Ann Potaracke^	Paulette Strom	
	Richard H. Getty	Abby Klein			Jeffrey Sulzbach	
	Steve Gilbertson^					

Volunteers

January 1 through December 31, 2012

More than 10 years

Mark Anderson
 Andrew Benjamin
 Tom Brix
 Joanne Broady
 Harold Coulter
 Kathy Dahl
 Gwen Denninger
 John Firkus
 Tatiana Glistvain
 John Griffiths
 Susan Kirkland
 Elaine Leonard
 Sharon Lovo
 Pati Maier
 Valerie Martinson
 Liz Murray
 Jim Pogue
 Sharon Ramey
 Bob Schafer
 Karla Schneider
 Jill Schwimmer
 Charles Sislo
 James Smith
 Will Sulzbach
 Christopher Wittich
 Barb Woodruff
 Mary Jo Woolf

5-10 years

Missy Anderson
 Mound
 Cindy Armstrong
 Janell Bentz
 Wayne Bjorlie
 Joe Bohlke
 Alan Bongaarts
 Brett Bordelon
 Dean Bossenecker
 Missy Brooks
 Jennifer Buege
 Georg Ann Burns
 Jerry Carroll
 Bob Cox
 Thaine Dirks
 Bob Dufek
 Andrea Eaton

Sally Patron-España
 Sam España
 Rachel Evenson
 Raymund Flies
 Tom Foley
 Ken Fraser
 Fabrice Georis
 Allison Guidette
 Phyllis Haag
 Gerry Halbach
 Ann Hartmann
 Cindy Heap
 Jeffrey Holland
 Jason Hoyme
 Sue Hults
 Thomas Johnson
 Dennis Johnson
 Dale Johnson
 Rebecca Johnson
 Emily Kaszynski
 Mary Katynski-
 Johnson
 Virginia Keenan
 Momodu Kemokai
 Jeffrey Maas
 Linda McCormick
 Jenna O'Connor
 Bob O'Keefe
 Lisa Olberg
 Dave Olsen
 Deb Olson
 Bill Patient
 Doug Paulson
 Kari Pumper
 Harold Richey
 Hilke Riechardt-
 Martinez
 Diane Rosenwald
 David Rosewall
 Rebecca Sluss
 Kenneth Stavrum
 Jim Stroebel
 Mary Thomas
 Analia Villalba
 Roger Wambheim
 Bill Werb
 Steve Willett
 Kylie Zoellmer

Less than 5 years

Linda Brown
 Russel Bruner
 Kat Bryan
 Scott Buell
 Karl Burkoth
 Justin Cannon
 Andrew Cannon
 Andrew Carlson
 Joel Carlson
 Josh Carlson
 Ryan Carlson
 Jason Carney
 Mythili Chari
 Weiyu Chen
 Sal Chhun
 Matt Clark
 Faye Clarke-
 Williams
 Rachel Commerford
 Cathy Cozard
 Craig Crandall
 Alexis Cress
 Becky Dally-Peek
 Vy Dam
 Christine Damico
 Mark Davies
 Victor De Meireles
 Allie DeBord
 Derek Delsing
 Angela Determan
 Girma Dinssa
 Maggie Doble
 John Dockry
 Cindy Dogan
 Ayi Doumassy
 Abigail Drumm
 Allie Eckert
 Ryan Eddy
 Gary Eggleston
 BenEirikson
 Cindy Eischens
 Mark Eischens
 Hussen Ejero
 Sweet Ejiofor
 Debrah Engen
 Doug Engen
 Kristin Erickson
 Bob Erickson



Volunteer Jeff Maas

Marcie Erickstad
 Yehimi Espinoza
 Gomez
 Victor Essiet
 Woinitu Estifanos
 Peter Faulhaber
 Erica Finken
 Matthew Fitzpatrick
 Erikka Flowers
 Jeff Forsberg
 Scott Forster
 Beth Franklin
 Jenny Freese
 Mike Friedlund
 Drake Friesen
 Colleen Gaichas
 Pam Gallagher
 Chao Gao
 Wyatt Garrity
 Samantha Gartner

Hadley Georgenson
 Pam Gerber
 Grant Gherity
 Dionne Gigley
 Steve Gilbertson
 Andy Gillund
 Natalie Gitelman
 Nichole Gleason
 Tom Gottwalt
 Tim Graham
 Kellyn Grantham
 Linda Graphenteen
 Eric Grauvilardell
 Jim Gregorich
 Vera Grom
 John Grom
 Bob Gronda
 Brenda Grove
 Maria Guion
 Jay Gulbrandsen

Loren Gullekson
 Xiaoxi Guo
 Karen Gustafson
 Lisa Guzek
 Montagne
 Brenden Hamrick
 Elise Hanson
 Sue Hareez
 Lisa Hario
 Kathy Harrell
 Christine Harwood
 Julie Haugen
 Will Hawthorne
 Eric He
 Amanda
 Hellenbrand
 Tom Henderson
 Nate Hermanson
 Claudia Hernandez
 Peter Hilton

Beth Hjelman
 Kirsten Hoechst
 Kodi Hoffarth
 Irene Holm
 Heidi Holterman
 Qui Hong
 Eric Hsu
 Jason Huang
 Tracy Huizel
 Andrew Isakson
 Krista Isley
 Ian Jackson
 Jamaal Jackson
 Jongeun Jang
 Dennis Jansen
 Roger Jepson
 Jon Jezierski
 Anne Johnson
 Danette Johnson
 Cassie Johnson

Jan Johnson
 Erik Johnson
 Lisa Johnson
 Joe Johnson
 Eric Johnson
 Tori Johnston
 Christine Johnston
 Jeremy Jonas
 Andy Jones
 Chris Jungmann
 Paula Kaiser
 Betty Kampen
 Osman Kanu
 Gary Kaplan
 Paul Kartman
 Barbara Keicher
 Frances Kern
 Talha Khan
 Pankaj Khurana
 Curtis Kilber

Volunteers continued



Volunteers at the East Side Neighborhood Services site

Dae Kim
 Jess Kingston
 Jon Kinsel
 Hilary Kirikov
 C.A. Kladek
 Anna Knutson
 Maria Kochetkova
 Paul Koester
 Jake Kogler
 Shakirat Kola-Lawal
 Amber Kollman
 Jennifer Komnick
 Shaohong Konkler
 Sam Kouri
 Natalie Krachman
 Cindy Kraemer
 Carol Ku
 Dan Kumerow
 John Kurila
 Alena Kurylchyk
 Daniel Kuske
 Theresa Kutz
 Brendan Lacy
 Jenny Lai
 Doug Lande
 Ruth Lane
 Robbie Langenfeld
 Steve Lantz
 Henry Lau
 Mark Lawless

Jackie Le
 Lekueyen Lee
 Michelle Lejcher
 Noah Lentz
 Maya Levitan
 Xuan Li
 Han Li
 Serena Li
 Jiacheng Liao
 Pete Lindenberg
 Keith Lindgren
 Rui Liu
 Ben Liverca
 Sandra Llapa
 Jennifer Lo
 Wen Long
 Ryan Long
 Matt Looyen
 Chia Lor
 Choua Lor
 Holly Love
 Andy Lowe
 Holly Lucchesi
 Furong Ma
 Kate Mabuice
 Sara Madsen
 William Mahrt
 Anthony Makundi
 Amanda Maly
 Greg Mann

Ashley Marschel
 Tim Martin
 Megan Maruska
 Nancy Mason
 Aaron Mastrian
 Jan Mayhew
 Jenny Mcaab
 Bryan McCall
 Celeste McCrimon
 Bobbi McCullough
 Mike McDonald
 Kelly McKay
 John Megivern
 Karla Menzel
 Michael Miao
 Sara Michalski
 Ingrid Michalski
 Steve Miller
 Ross Misheev
 Jennifer Moline
 Blanca Monte Monroy
 David Moore
 Doug Moore
 Lou Moua
 Kao Moua
 Ruth Mueller
 Amber Mueller
 Candee Murphy
 Grace Musgrove
 George Mutuma

Jenny Myhre
 Kathleen Nance
 David Narvaez
 Travis Naylor
 Molly Nelson
 Mary Neuman
 Tiffany New
 Danny Ng
 Erica Nguyen
 Dan Nguyen
 Jennifer Nguyen
 Annette Nicholson
 Debra Niemela
 Janice Nishimura
 Cristiana Nita
 Abdirizak Noor
 Greg Norman
 Jeanne Novak
 Beth Novak
 Kyle O'Dwyer
 Zeek Oh
 Valeska Okragly
 Mehvish Olia
 Ruth Olson
 Courtney Opsahl
 Wanda Ortiz-
 Maysonet
 Joseph Ott
 Leona Page
 Valli Palanisami

Ken Palmer
 Theresa Panchyshyn
 Chhanda Panda
 Bel Paray
 Anne Parsons
 Tony Parsons
 Nathan Patrash
 Erik Pederson
 Spencer Peka
 Chris Perez
 Carol Perkins
 Asta Petkute
 Kelsey Pexa
 Mai Pha
 Marie Pilarski
 Jason Plank
 Alejandro Portela Cruz
 Emily Poskie-Wilson
 Chris Pricco
 Melissa Price
 Thomas Prokosch
 Rachel Provence
 Ashley Quam
 Nancy Qui
 Veronica Quito
 Liz Raimann
 Monique Randolph
 Shane Rau
 Anna Reding
 Marek Reiter

Meng Ren
 Olga Repeshcheck
 Louisa Resner
 Emily Resseger
 Luisa Rios
 Michael Roberts
 Ashley Roemhild
 Sherry Rook
 Tanairy Rosas
 Andrea Rovner
 Rich Rubesch
 Linda Ruecker
 Kyle Ruesch
 Kate Russell
 Joe Ryan
 Olga Rynyak
 Uttam Sah
 Miriam Sahooani
 Carly Sanko
 Mark Sastry
 Jake Saufley
 Matt Saunders
 Maria Savayan
 Scott Schachtman
 Robert Schember
 Mark Schleeter
 Emily Schlosser
 Magdalena Schmidt
 Jared Schultz
 Nicole Schumacher
 Michael Sedki
 Lyndon Shirley
 Sarah Shu
 Steven Sidla
 Asfaw Silga
 Karen Simmons
 Olubunmi Simpeh
 Alex Slichter
 Tyler Smethers
 Lenie Smith
 Renan Snowden
 Mark Sobotka
 Jordan Soderstrom
 Sarah Spindler
 Vibashreya Srivatsan
 Matthew Stangl
 Bonnie Stark
 Becca Stark Holschuh
 Meghan Stelzig

Julia Stewart
 Stefan Strelnieks
 Chris Styring
 Rafael Suarez
 Molly Sullivan
 Xun Sun
 John Sundmacker
 Victor Susai Arul
 Antony
 Larry Swanson
 Anna Swanson
 Mo Sweidan
 John Swenson
 Christopher Sylvah
 Julia Tabbut
 Sheri Taylor
 Ian Teplin
 Ka Thao
 Soua Thao
 Paul Theis
 Rachel Thompson
 Nicholas Thunker
 Yu Tian
 Chris Tollafield
 Steve Tollefson
 Thanh Tong
 Joe Touchet
 Cody Tresselt-
 Warren
 Lana Truelson
 Anthony Truong
 Mai Vang
 La Vang
 Dawn Vang
 Leslie Vang
 Miracle Vansiea
 Rodrigo Vazquez
 JC Villanueva
 Timothy Vogel
 Frank Volkers
 Sylesh Volla
 Satya Volla
 Anna Volovik
 Jason Wagner
 John Waisanen
 Sandra Wakeman
 Elizabeth Walker
 Jenna Wallin
 Stacey Walters

Xue Wang
 Samsam Warsame
 Gary Webb
 Mackenzie Weber
 Ellen Wersan
 David Westlund
 Pamela Whitcomb
 Felicia Widi
 Patrick Wieneke
 Steven Wiley
 Rebecca Wimmer
 David Woodard
 Mai Shor Xiong
 Tia Xiong
 Wendy Xiong
 Jie Xu
 Xiaoman Xu
 Yidan Xu
 Wenjing Yan
 Pa Yang
 Jake Yang
 Kong Yang
 Jenny Yao
 Jimmy Yeung
 Bonnie Yusuf
 Cathy Zemmels
 Jessie Zhan
 Li Zhang
 Amy Zhang
 Ye Zhu
 Andrea Zhuang
 Jim Zimmer
 Cody Zustiak

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Operations Director

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Financial Services
Director

Brian Kao
Claim It! Campaign
Manager

Timothy Kenney
Tax Services Director

Thomas J. Larson
Self-Employment
Manager

Anel Mendoza
Office Manager

Stacy Opitz
Marketing and
Communications Direc-
tor

Kari Page
Self-Employment Coordi-
nator

Katy Schultz
Tax Services Manager

Erin Severson
Technical Assistance
Manager



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Self-Prep Assistant

Shannon Doyle
Financial Services Specialist

John Firkus
Self-Prep Assistant

Darwin Flores Trujillo
Tax Site Manager

James Ford
Financial Services Specialist

Heather Frank
Tax Site Manager

Aleathea Garry
Tax Site Manager

Renée Goneau
Self-Prep Assistant

Brenda Grove
Remote Tax Prep Manager

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Eric Kiefer
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Tax Site Manager

Susan Kirkland
E-File Coordinator

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Tax Site Manager

Namibia Little
Financial Services Specialist

Mubarek Lolo
Tax Site Manager

Sarah Madsen
Self-Prep Assistant

Melissa Nguyen
Tax Site Manager

Ify Onyiah
Financial Services Specialist

Adriana Pinner
Financial Services Specialist

Alona Posherstnik
Tax Site Manager

Paul Raymond
Financial Services Specialist

Aqueelah Roberson
Financial Services Specialist

Renée Rojo
Customer Service Assistant

Josie Shardlow
Financial Services Specialist

Nicole Smith
Financial Services Specialist

Angela Sommers
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Vernon Sowell
Tax Site Manager

Andra Thompson
Financial Services Specialist

Cindy Valenzuela
Tax Site Manager

Mai Cha Vang
Tax Site Manager

Armando Vilchez
Tax Site Manager

Acacia Willey
Tax Site Manager

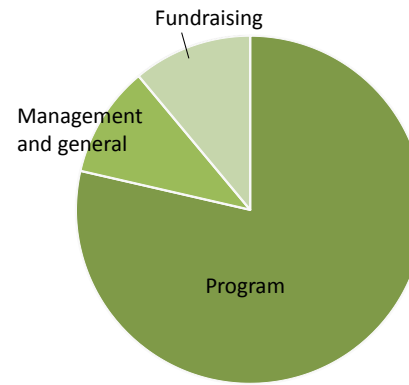
Financial summary

July 1, 2011 - June 30, 2012

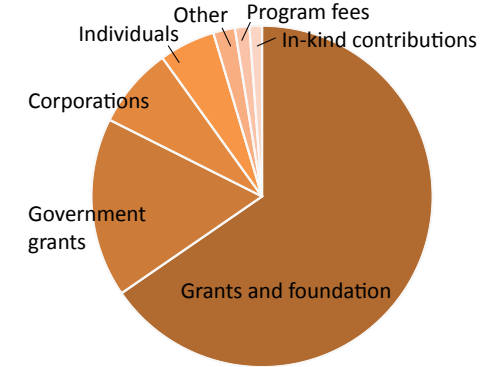
Statement of financial position

ASSETS	FY2012	FY2011
<i>Current assets</i>		
Cash and cash equivalents	\$375,905	\$150,438
Cash - restricted	6,184	6,179
Grants receivable	11,950	355,144
Other receivable	8,640	8,640
Other current assets	7,575	7,773
Total current assets	\$410,254	\$528,174
<i>Noncurrent assets</i>		
Furniture and equipment	\$139,612	\$109,370
Leasehold improvements	36,203	--
Less accumulated depreciation	(111,202)	(99,130)
Endowment investments	77,646	80,823
Total noncurrent assets	\$142,259	\$91,063
TOTAL ASSETS	\$552,513	\$619,237
<i>LIABILITIES</i>		
<i>Current liabilities</i>		
Accounts payable	\$15,825	\$ 13,302
Accrued expenses	77,793	56,423
TOTAL LIABILITIES	\$93,618	\$69,725
<i>NET ASSETS</i>		
Unrestricted	\$368,798	\$119,188
Temporarily restricted	11,950	349,000
Permanently restricted	78,147	81,324
TOTAL NET ASSETS	\$458,895	\$549,512
TOTAL LIABILITIES AND NET ASSETS	\$552,513	\$619,237

Your investments at work



Sources of contributions



Statement of activities

SUPPORT AND REVENUE*	FY2012
Grants and Foundation	\$653,547
Government grants	169,935
Corporations	76,650
Individuals	53,121
Other	20,493
Program fees	13,671
In-kind contributions	11,817
TOTAL SUPPORT AND REVENUE	\$999,234
EXPENSES*	
Program	\$853,192
Management and general	112,355
Fundraising	120,078
TOTAL EXPENSES	\$1,085,625