

**EarnIt!
KeepIt!
\$aveIt!**

Thank you for helping us provide free tax preparation services by completing this anonymous voluntary survey. United Way of the Wine Country will use your answers to demonstrate the need for free tax preparation and to improve our services. All responses are kept confidential.

Information in this box to be completed by Site Coordinator or Intake Coordinator only.

Site Name _____

Today's Appt. Date: ___/___/___

Client Survey Instructions: Complete one survey per household based on the primary filer.

1. Your Zip Code: _____

2. Please indicate household type as stated on the intake form:

<input type="radio"/> Single/No children	<input type="radio"/> Two adults with children
<input type="radio"/> Single parent	<input type="radio"/> Two adults/No children
	<input type="radio"/> Other _____

3. What is your age range?

_____ Age 18 to 24	_____ Age 25-35	_____ Age 36-45
_____ Age 46 to 65	_____ Age 66 or older	

4. With which of the following do you most identify? (Choose one)

<input type="radio"/> Asian or Pacific Islander	<input type="radio"/> Caucasian/White	<input type="radio"/> American Indian
<input type="radio"/> Black or African American	<input type="radio"/> Middle Eastern/Arab	<input type="radio"/> Multi-racial/multi-ethnic
<input type="radio"/> Latino or Hispanic		

5. What is your current work situation? (Check all that apply)

<input type="radio"/> I have a full-time job	<input type="radio"/> I am unemployed
<input type="radio"/> I am self-employed	<input type="radio"/> I am on disability
<input type="radio"/> I work part-time at this many jobs: _____#	<input type="radio"/> I am retired
<input type="radio"/> I am a student	<input type="radio"/> Other: _____

6. Do you have income from self-employment?
 No
 Yes

7. How did you hear about our free tax prep services? (Fill in all that apply)

<input type="radio"/> I came here last year	<input type="radio"/> Heard it on the radio
<input type="radio"/> Saw it on a flyer/poster	<input type="radio"/> Got a postcard in the mail
<input type="radio"/> Heard about it from a friend or family member	<input type="radio"/> Saw it on a bus ad
<input type="radio"/> Heard it from another non-profit organization	<input type="radio"/> Saw it in the newspaper
	<input type="radio"/> Saw it on Facebook or Twitter

8. How did you have your taxes prepared last year? (Choose one)

<input type="radio"/> I came to this location	<input type="radio"/> I paid a tax preparer
<input type="radio"/> I prepared my taxes for free at another location	<input type="radio"/> I paid online to get them done
<input type="radio"/> I prepared my own taxes for free online	<input type="radio"/> I did not file last year
	<input type="radio"/> Other (please state): _____

9. If you paid a preparer to do your taxes, why did you pay? (Skip to #10 if you did not pay a preparer)
 I didn't know that I could get them done for free
 I didn't qualify for free tax prep services
 It is the person I have been going to every year
 I thought a paid preparer would be better qualified
 It was more convenient for me to go to a paid tax preparer because of time, location, etc.
 Other (please state): _____

10. **Do you currently have a bank or credit union account? (Fill in one)**
- Yes, checking only
 Yes, checking and savings
 Yes, savings only
 No, I do not have any type of account

11. **Please rate the following during your tax appointment:**

	Excellent	Good	Fair	Poor
Quality of tax preparation service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helpfulness of staff or volunteers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to communicate with staff or volunteers in my preferred language	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. **Would you recommend this free tax preparation service to others?** Yes No

13. **Have you heard about the California Earned Income Tax Credit (CalEITC)?**

- I haven't heard about it
 I heard about it when filing my taxes today
 I heard about it through radio/TV/Social Media
 I heard about it from a friend or family member
 I heard about it when I made my appointment

14. **If you are eligible for a tax refund, how will you receive it? (Check all that apply)**

- Deposit into a checking account
 Will be mailed a check
 Deposit into a savings account
 Other (please state): _____
 Deposit onto a free bankcard

15. **If you receive a refund today, what do you plan to do with it? (Check all that apply)**

- Save it
 Pay utility and bills (electricity, water, etc.)
 Pay for medical expenses
 Pay for car expenses
 Pay off debts/credit cards
 Pay for Child care
 Pay for tuition/educ. for me or my children
 Pay for clothing/shoes for me or my children
 Pay rent/mortgage or home repairs
 Other (please state): _____

16. **If I receive a refund, I will... (Check all that apply)**

- Feel more capable of handling a financial emergency
 Feel less stressed about meeting my monthly expenses
 Feel more financially secure
 Feel like I am closer to meeting my financial goals

17. **If you received the federal or state Earned Income Tax Credit, can we interview you? Your feedback would help us understand the impact of this credit. If so, please give us your contact information and one of our colleagues will contact you.**

- Name: _____
 Phone Number (with area code): _____
 Please check here if this is a mobile phone number.
 Email Address: _____

Thank you for taking the time to complete this survey.

Before you leave, please return your completed survey to the person who greeted you today.