

Help US serve YOU better!
Please take a moment to complete the survey.

VITA site: _____
Did you have an Appointment or Walk-in? _____

in Household? _____ Zip Code? _____

Race:

- American Indian/Alaskan native
- African American
- Asian
- Caucasian
- Hispanic
- Pacific Islander
- Other _____

Age:

- Under 25
- 25-39
- 40-49
- 50-64
- 65+

Gender:

- Male
- Female

Referred by? 2-1-1 Newspaper DWS TV/Radio
Other: _____

How many times have you had taxes prepared at a VITA site?
1 2 3-4 5+

Tax Filing and EITC History

Did you file taxes last year?
Yes No Don't Know

Did you receive help in filing your taxes last year?
Yes No Don't Know

If yes, where did you get help filing your taxes?

If you did NOT file taxes last year, why not?

- Forgot to file
- Had no income
- No SSI or ITID
- Other: _____

If you did not file last year, why did you file this year?

- Learned about EITC
- Learned about VITA
- Heard I could get money back
- Someone told me I had to file
- Other: _____

Were you familiar with the Earned Income Tax Credit (EITC) prior to coming to the site?
Yes No

Did you receive EITC last year?
Yes No Don't Know

SEE REVERSE FOR MORE QUESTIONS

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Yes No Don't Know

SEE REVERSE FOR MORE QUESTIONS

If you received EITC last year, how much was your refund?
\$0-\$500 \$501-\$1500 \$1501-\$2500 \$2501+

Plans for refund:

Did you receive a brochure about Financial Asset Building?
Yes No

How are you planning on spending your refund?

Financial Information:

Where do you cash your checks?

- Convenient/Grocery Store
- Bank/Credit Union
- Check Cashing Store
- Direct Deposit

Other: _____

Where do you access additional funds, when needed?
(If Applicable)

- Bank/Credit Union
- Friends/Family
- Payday Lender
- Small Loan/Finance Co.
- Credit Card

Other: _____

Do you have a Bank/Credit Union account?

Yes No Don't Know

What kind of accounts do you have? (Circle all that apply)

Checking Savings Other: _____

If wanted, why haven't you acquired an account?

- No Bank/Credit Union near me
- I don't like or trust Banks/Credit Unions
- I think it will cost too much
- Afraid I won't qualify

Other: _____

What services would you be interested in learning about?

Please check all that apply:

- ___ Opening a savings/checking account
- ___ Education/Training on banking services
- ___ Starting/Expanding a small business
- ___ Paying Debt
- ___ Paying extra on debts/loans/mortgage
- ___ Retirement Plans
- ___ Health insurance
- ___ Life insurance
- ___ Buying a home
- ___ Buying/Repairing a vehicle
- ___ Repairing/Remodeling a home
- ___ Investing
- ___ Public Assistance Programs (i.e. food stamps, housing)
- ___ Financial education
- ___ Buying a computer for home/business/education

THANK YOU! SEE YOU NEXT YEAR!

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THANK YOU! SEE YOU NEXT YEAR!