



FOR IMMEDIATE RELEASE

Bethpage to Offer Qualifying Taxpayers Three Different Free Virtual Tax Filing Options for 2022

Bethpage, NY – January 27, 2022 – Qualifying taxpayers will have three different ways to file their taxes for free this year, thanks to Bethpage Federal Credit Union, the only financial institution to offer the IRS’ Volunteer Income Tax Assistance (VITA) program on Long Island. Now in its 19th year, Bethpage’s VITA program is open to all eligible Long Islanders, including non-Bethpage members.

The first option available to taxpayers is Bethpage’s Virtual VITA program where taxpayers will meet with Bethpage’s trained volunteers virtually, who will then prepare and e-file the tax returns. Virtual appointments will take place February 1 through April 7, 2022. Pre-scheduled appointments are required and can be made on Bethpage’s website at lovebethpage.com/vita.

The second option Bethpage is making available through its ongoing VITA initiative is its Facilitated Self Assistance (FSA) program. Here, New York State Department of Taxation and Finance employee volunteers will help taxpayers prepare and e-file income tax returns for free, virtually during a series of virtual lab sessions. To register for a lab session, contact Bethpage’s Community Development team at 516/349-4288 or email them directly at community@bethpagefcu.com. FSA Lab sessions will take place on February 14, February 28, March 14 and March 28, 2022 from 1:00 PM through 4:00 PM.

The final option available is Bethpage’s VITA “Use Our Software for Free” TaxSlayer (FSA) program, which will make tax filing software available for free to qualifying taxpayers, after they participate in prerequisite lab sessions to learn how to use the software to e-file tax returns themselves. To participate, taxpayers must first register to participate in a January 27, 2022 virtual information webinar, presented by Bethpage and the New York State Department of Taxation and Finance, from 5:00 PM through 7:00 PM. To register, visit lovethpage.com/vita or contact Bethpage’s Community Development

team at 516/349-4288 or community@bethpagefcu.com. For those unable to attend the virtual webinar, Bethpage can provide a recording, if requested.

“We are pleased to be able to offer two new tax filing options for taxpayers,” said Ever Martinez, Community Development Relationship Manager, Bethpage. “Although prepared and e-filed by the taxpayer directly, last year we were able to test the programs and most found them to be very easy to navigate. We are confident this year’s taxpayers will as well. The entire process is very easy.”

Martinez continued, “And for those that want Bethpage’s trained volunteers to prepare and e-file their tax returns, we recommend they schedule appointments sooner than later as there are a limited number of appointments available.”

Bethpage VITA volunteers will also educate eligible working families about the Earned Income Tax Credit (EITC) while preparing tax returns. The EITC is an anti-poverty program available to four out of five eligible Long Island households and could put an extra \$6,728 into the hands of deserving Long Island families. Credit amounts are based on income levels, filing status and other factors.

“For 19 years Bethpage has worked to help the community receive free tax filing assistance and the tax returns and credits they deserve. These are the types of services that make the most impact on an individual and a family, and the kinds of services that Bethpage is proud to provide,” said Robert Suarez, Assistance Vice President, Bethpage.

In 2021, Bethpage completed 776 VITA tax returns through its first virtual VITA program, and helped secure IRS total refunds of over \$1,200,000. Bethpage also helped secure \$217,181 in child tax credits in 2020, and \$204,756 in Earned Income Tax Credits.

Since the program’s inception in 2004, over 25,042 individuals have filed their tax returns through Bethpage, resulting in \$27,752,294 million returned to the Long Island community.

Qualifying taxpayers planning to take advantage of Bethpage’s VITA program must bring the following materials with them for review: photo identification, social security cards for you, your spouse, and dependents, current year’s tax package if you received one, wage and earnings statement(s) Form W-2, W-2G, 1099-R from all employers, interest and dividend statements from banks (Forms 1099), a copy of last year’s Federal and State returns if available, bank routing and account numbers for tax refund direct deposit, total paid for daycare, and provider’s tax ID.

For more information, please visit Bethpage’s “Volunteer Income Tax Assistance Program – VITA” page located in the Community Section at www.lovebethpage.com/vita or contact Community Development directly at 516/349-4288, or by email at Community@bethpagefcu.com.

Bethpage Federal Credit Union is a premier community financial institution committed to enriching the lives of its members, employees and the communities it serves for the past 80 years. Bethpage is the largest credit union in the Northeast Region, and the 13th largest in the nation.

As a not-for-profit credit union, Bethpage is committed to its members and the communities it serves. In addition to giving back to its members in the form of great rates and low fees, the Bethpage Cares program invests heavily in local, high-impact community programs that serve with an eye towards creating better communities through diversity, inclusion and belonging.

Voted the fifth Best Company to Work for in New York State by the New York State Society for Human Resources Management and the Glass Door Top Place to work for Small & Midsize companies, Bethpage is a federally chartered credit union, available to people nationwide who open a \$5 dollar membership account. Bethpage offers a robust digital platform that allows members to bank from anywhere. Bethpage is a part of the national CO-OP network that gives members access to their accounts at over 30,000 free ATMs and 5,000+ shared branches across the U.S. As a financial cooperative, Bethpage offers the best-in market rates, lowest fees and world-class service, plus a full menu of personal and commercial financial services. For more information on Bethpage's robust portfolio of banking, borrowing, and investment services, visit www.lovebethpage.com or call 1-800- 628-7070.

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