

APPLICATION FOR THE SAN FRANCISCO WORKING FAMILIES CREDIT



PACKET INCLUDES: Program Information & Locations • Application/4506-T Form • Survey



APPLICATION FOR SAN FRANCISCO WORKING FAMILIES CREDIT

A Program of the City and County of San Francisco
Sponsored by

H&R BLOCK®

WHAT IS THE WORKING FAMILIES CREDIT?

The Working Families Credit is an extra cash boost to qualified low-income families in San Francisco. Eligible families will receive a percentage match to their federal Earned Income Tax Credit payment (EITC), subject to available funds. This credit will not count as income for determining eligibility for most public benefit programs.

INSTRUCTIONS

Step 1: Check if you are eligible

You are eligible if you meet **all four** of the criteria below:

1. You earned less than \$37,263 in 2005
2. You claim and qualify for the federal Earned Income Tax Credit
3. You are claiming at least one dependent child on your federal tax filing who is either: A) under age 19; B) under age 24 and a full-time student; or C) permanently and totally disabled
4. You live in San Francisco

Step 2: Complete the application

Complete the application on pages 3 and 4. **You must complete and sign both the front and back.**

You can complete the application yourself or have a tax preparer complete it for you. For help completing the application call 415-554-5678 or see the list of tax preparation sites on the back of this form.

Step 3: Choose how you want to receive your credit

You may choose from one of three options:

Check – checks will be mailed to the address on file.

Direct deposit – deposit your Working Families Credit directly into your checking or savings account. You must fill out your account information on the application and enclose a cancelled check from that account.

H&R Block Debit Card – access your Working Families Credit with a debit card at ATMs and point-of-sale transactions (stores, gas stations, etc). The debit card has no monthly maintenance fees. The debit card is free to use for point-of-sale transactions and costs \$1 per withdrawal from an ATM. If you choose this option, H&R Block will mail you a separate application which must be completed and returned.

Step 4: Submit by April 17th, 2006

Send your completed application and optional survey to:

**WFC Program
PO Box 7427
San Francisco, CA 94120-7427**

or deliver to City Hall, Room 140, any free tax preparation site, or any H&R Block location in San Francisco.

Applications must be postmarked or delivered by April 17th, 2006. Do not attach your tax documents to the application.

Step 5: Receive your Working Families Credit in September

If your application is successful, you will receive your Working Families Credit in September 2006, subject to availability of funds.



OPTIONAL APPLICATION SURVEY

- The information you provide will help the City to serve you better.
- You are not required to fill out this survey in order to receive the Working Families Credit.
- Your answers will not affect your eligibility for the credit.

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Last Name

First Name

Last four digits of your Social Security Number

Date of Birth

1. How did you have your federal taxes prepared?

This Year Last Year

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did not file taxes |
| <input type="checkbox"/> | <input type="checkbox"/> | Went to H&R Block, Jackson Hewitt, or Liberty Tax |
| <input type="checkbox"/> | <input type="checkbox"/> | Went to another paid/commercial tax preparation service |
| <input type="checkbox"/> | <input type="checkbox"/> | Went to a free tax preparation site or to the IRS |
| <input type="checkbox"/> | <input type="checkbox"/> | Did my own taxes or friend or family did them for me for free |
| <input type="checkbox"/> | <input type="checkbox"/> | Other _____ |

2. How did you hear about the Working Families Credit? (check all that apply)

- | | | |
|--|--|--|
| <input type="checkbox"/> Friend or family member | <input type="checkbox"/> Radio | <input type="checkbox"/> Flyer or poster |
| <input type="checkbox"/> Billboard or MUNI | <input type="checkbox"/> Claimed last year | <input type="checkbox"/> At tax preparation office |
| <input type="checkbox"/> TV | <input type="checkbox"/> Newspaper | <input type="checkbox"/> Other: _____ |

3. Most applicants can expect a Working Families Credit of \$100 to \$300, subject to available funding. How do you plan to use your Credit? If you received the Credit last year, how did you use it? (check all that apply)

- | Planned Use
(for this year) | Actual Use
(if received last year) | |
|-----------------------------------|---------------------------------------|---|
| <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | Pay off debt/late bills |
| <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | Save it |
| <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | Spend it on items such as car, education, business, or moving |
| <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | Spend it on items such as food, rent or clothes |
| <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | Spend it on items such as furniture or appliances |
| <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | Spend it on items such as events, trips, or treat for family |
| <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | Not sure |
| <input type="checkbox"/> \$ _____ | <input type="checkbox"/> \$ _____ | Other: _____ |

4. What is your ethnicity?

- African-American Chinese Hispanic/Latino Caucasian/White Other: _____

5. Who in your household has health insurance, whether private or from Medicare or Medi-Cal?

- Neither me nor my children Just my children Just me Both my children and me

6. What is the highest degree you have completed?

- | | | |
|--|---|--|
| <input type="checkbox"/> Less than High School diploma | <input type="checkbox"/> Some college | <input type="checkbox"/> Bachelor Degree |
| <input type="checkbox"/> High School Diploma or GED | <input type="checkbox"/> Associate Degree | <input type="checkbox"/> Graduate Degree |

7a. Do you currently (check all that apply):

- | | | |
|--|---|---|
| <input type="checkbox"/> Have a checking account | <input type="checkbox"/> Have a savings account | <input type="checkbox"/> Have an ATM/debit card |
| <input type="checkbox"/> Have a credit card | <input type="checkbox"/> Use direct deposit | |

7b. In the last 12 months have you (check all that apply):

- | | |
|---|---|
| <input type="checkbox"/> Been behind on your phone, gas or electric bills | <input type="checkbox"/> Taken a loan or had help from family or friends |
| <input type="checkbox"/> Purchased a lottery ticket at least once a week | <input type="checkbox"/> Used a check casher <input type="checkbox"/> Taken a payday loan |

8. How much savings do you have? How much debt do you have?

	\$0	\$1-\$250	\$251-\$500	\$501-\$1,000	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$10,000	\$10,001+
Total Savings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage Debt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All other Debt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. What was your household income in 2005?

- Less than \$10,000 \$10,000 - \$14,999 \$15,000 - \$24,999 \$25,000 - \$34,999 \$35,000 or more

DETACH HERE





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You can apply for the Credit or drop off your application at the following locations:

San Francisco City Treasurer's Office: City Hall, Room 140
H&R Block Locations in San Francisco
Free Tax Preparation Sites in San Francisco

H&R BLOCK LOCATIONS IN SAN FRANCISCO

Market at Duboce
1965 Market Street
(415) 431-5331

Noriega near 22nd
1510 Noriega Street
(415) 564-6111

Mission near 16th
1984 Mission Street
(415) 863-2258

Geary and 20th
5550 Geary Street
(415) 387-0610

Van Ness near Clay
1745 Van Ness Avenue
(415) 441-2666

Lombard near Fillmore
2151 Lombard Street
(415) 567-7512

Taraval near 27th
1727 Taraval Street
(415) 566-6434

Geary/Parker
3250 Geary Street
(415) 379-9528

Divisadero at Pine
1900 Divisadero Street
(415) 474-0318

Market near Castro
2370 Market Street
(415) 241-0318

Sansome at Pine/Ground Floor
220 Sansome Street
1st Floor
(415) 397-1040

Northpoint
Northpoint Shopping Center
350 Bay Street
(415) 677-4309

Financial Center
220 Sansome Street
Ste. 100
(415) 403-3690

Mission at Geneva
5109 Mission Street
(415) 334-4362

W. Portal
366 West Portal
(415) 665-4540

Bayview
3801 3rd Street, #500
(415) 647-7864

San Bruno
2955 San Bruno Avenue
(415) 467-0499

Mission near 29th
Tiffany Garden
199 Tiffany Avenue, #40
(415) 643-3162

FREE* TAX PREPARATION SITES IN SAN FRANCISCO FOR HOURS OF OPERATION, CALL: 1-800-358-8832

*For families with incomes of less than \$38,000

1028 Howard Street Apartments
1028 Howard Street @ 6th Street

ACORN
5319 Mission Street @ Allison Street

Agape Community Center
378 18th Avenue @ Geary

Arriba Juntos
1850 Mission Street

Boys & Girls Club of SF
450 Guerrero Street @ 17th Street

Burton High School VITA
400 Mansell Street @ Somerset Street

Career Link
3120 Mission Street @ Cesar Chavez

Chinese Newcomers Service Center
777 Stockton Street, #104,
@ Sacramento Street

Employment Information Center
170 Otis Street @ 13th Street

Federal Building
481 O'Farrell Street

Glide Memorial Church
330 Ellis Street @ Taylor Street

Hamilton Recreation Center
1900 Geary Boulevard @ Steiner

Homeless Prenatal
2500 18th Street

Northeast Community Federal Credit Union (CHINATOWN)
1040 Grant Ave., 6th floor @ Jackson Street

Northeast Community Federal Credit Union (TENDERLOIN)
288 Jones Street @ Eddy Street

Northeast Community Federal Credit Union (Visitacion)
29 Leland Avenue

OMI / Excelsior Beacon Center
Seneca Avenue @ San Jose

Personal Assisted Employment Services
1235 Mission Street @ 8th Street

St. Mary's Senior Services
2250 Hays Street

St. Peters Parish School
1249 Alabama Street @ 24th Street

Salvation Army Chinatown Corps
1450 Powell Street @ Broadway

San Francisco State University
1600 Holloway Avenue, Science Building,
Room 202

SF AIDS Foundation
One Sixth Street @ Market Street

Southeast Community Facility
1800 Oakdale Avenue @ Phelps Street

State of California EDD
801 Turk Street

Stonestown YMCA
3150 20th Avenue

Sunset Neighborhood Beacon Center
3925 Noriega Street @ 46th Avenue

Tenderloin Community School
627 Turk Street @ Van Ness

The Women's Building
3543 18th Street @ Valencia Street

UC Hastings College of the Law
200 McAllister Street @ Hyde

Visitacion Valley Community Center
66 Raymond Avenue @ Bayshore

Young Community Developers
1715 Yosemite Avenue @ Third Street

DETACH THIS INFORMATION SHEET FOR YOUR RECORDS

