



MyFreeTaxes Self-Employed Tax Guides

For Small Business Owners | For Gig Economy Entrepreneurs | For Home-Based Child Care Businesses

MyFreeTaxes Self-Employed Tax Guides Release Webinar

United Way Worldwide and Civitas Strategies, LLC

March 2, 2023, 2 pm ET



Agenda

- Welcome
- About MyFreeTaxes
- About Civitas Strategies, LLC
- Overview of the MyFreeTaxes Self-Employed Tax Guides
- MyFreeTaxes Support Offerings
- Outreach and Promotion
- Q&A

Today's Speakers



Bryndan Stueve

Manager
Community Impact
and Economic
Mobility

United Way
Worldwide



Ynaira Burgos

Manager, Economic
Mobility Programs

United Way
Worldwide



Laura Scherler

Senior Director
Economic Mobility
and Corporate
Solutions

United Way
Worldwide

What is MyFreeTaxes?

MyFreeTaxes is an online tax filing program that helps people file their federal and state taxes for free while getting the assistance they need.

United Way provides MyFreeTaxes in partnership with the IRS's Volunteer Income Tax Assistance (VITA) program to help filers prepare their tax returns on their own or have their return prepared for them for free.

For millions of Americans, tax refunds and credits are essential to their financial stability and success. These credits maximize filers' refunds and provide important opportunities for individuals and families to build financial stability. For many households, their tax refund may be the biggest check they receive all year.

That is why United Way provides MyFreeTaxes. Since 2009, MyFreeTaxes has helped more than 1.3 million people file their taxes for free while claiming over \$1 billion in refunds and saving over \$260 million in filing fees.

Get started at www.myfreetaxes.com.

Why United Way Created These Guides

- Better support for MyFreeTaxes users
 - 10% of MyFreeTaxes users have self-employment income and could benefit from these additional resources
- Scale access to safe, easy, and free tax filing for LMI entrepreneurs
 - 17% - 28% of households (26 million – 44 million) have self-employment income
 - Half of all microbusinesses (13 million households) have incomes below \$50k annually
 - Only about 6% of VITA and TCE returns include Schedule C for self-employment income

Overview of the MyFreeTaxes Self-Employed Tax Guides

Who We Are

- Founded 14 years ago to help nonprofits and small businesses excel.
- Our team of 15 has a varied and deep background, working with small businesses nationwide.
- Tax education has been a critical part of our work since inception.

A New Approach to Tax Support

Taxes are a key opportunity and risk for small businesses

The ability to offer quality returns at scale is a key challenge

We have turned to digital software which is already in distribution and effective

MyFreeTaxes Self-Employed Tax Guides

Actionable, easy-to-use guides for business owners and entrepreneurs that need to file a **Schedule C**. They include information on:

- **How business taxes work** and the important components of tax documents
- Step-by-step guidance on **how to use the software**
- Helpful **worksheets** and **resources** to build understanding and make implementation a breeze
- As a result, business owners can have **confidence** in their tax filings and are more empowered in their new business operation skills

How These Guides Differ



Small Business Owners:

- Focuses on a range of micro businesses such as Etsy sellers to those with side hustles, freelancers, or other independent contractors
- Covers a range of scenarios including the use of a home office



Gig Economy Entrepreneurs:

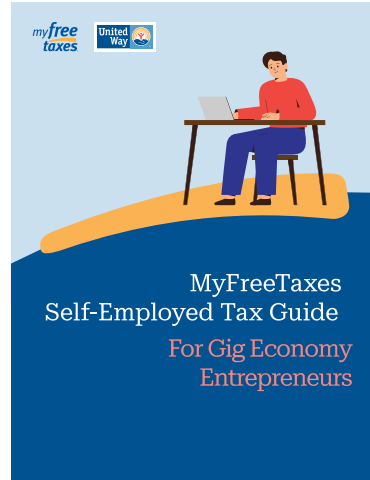
- Focuses on those who are working with apps and other tools that allow them to work on demand, particularly using their own vehicle
- Covers operations with a particular emphasis on transportation costs



Home-Based Child Care Providers:

- Focuses on business owners who operate a child care out of their home
- Addresses several tax rules exclusive to these business owners

Multiple Versions Curated to Meet the Needs of Specific Audiences



Three Versions, in English and Spanish

MyFreeTaxes Self-Employed Tax Guides:

- For Small Business Owners
- For Gig Economy Entrepreneurs
- For Home-Based Child Care Businesses

Available as embedded content and downloadable PDFs at myfreetaxes.com/selfemployed and myfreetaxes.com/es/cuentapropia

Each Guide is Available in Video Format



Support for MyFreeTaxes Filers with Self-Employment Income

Our IRS-certified support specialists are available to assist MyFreeTaxes users at myfreetaxes.com/support.

- Phone Helpline
 - 10a – 6p Daily thru April 18; 5 days a week April 19 – Oct 31
- Email and Message Support
 - Receive a reply within one business day
- Searchable FAQs
- Filer Guides and Videos
 - Currently: MyFreeTaxes Self-Employed Tax Guides
 - More on the way!

Demo:
MyFreeTaxes Self-Employed Tax Guides

File your taxes for free.
Get the assistance you
need.
Seriously.

MyFreeTaxes helps people file their
federal and state taxes for free, and
it's brought to you by United Way.

ABOUT

FAQ

SELF-EMPLOYED TAX GUIDES

NEWSLETTER SIGN-UP

TAX TIME FINANCIAL CHECKLIST

PARTNER PORTAL

PRIVACY POLICY

SUPPORTERS

VOLUNTEER

How would you like to file your taxes?



File My Own Taxes

- Our most popular option
- Self-file and get help when you need it
- Fastest (takes most filers an hour or less)



Have My Taxes Prepared for Me

- Have your return prepared for you online or in-person
- Typically takes 1-2+ weeks
- For filers who make about \$60,000 or less

File your taxes for free. Choose the filing option that works best for you.

File My Own Taxes Have My Taxes Prepared for Me

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File My Own Taxes

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Have My Taxes Prepared for Me

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- Typically takes 1-2+ weeks
- For filers who make about \$60,000 or less

Let us help you file your own taxes for free.

This is a great option for people who:

- Are filing a current year return (for 2022 taxes).
- Are comfortable using tax software, or want to learn.

Did you earn less than \$73,000 in 2022?*

Yes

No

What is your ZIP code?*

Zip code

Do you have income from self-employment?*

Yes

No

☐ I would like to opt-in to be contacted by United Way (optional).

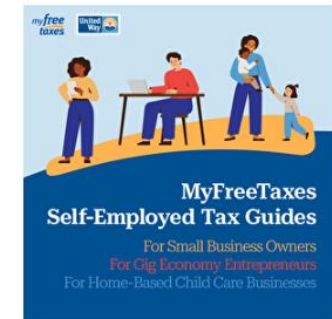
FILE NOW

Do you have income from self-employment?*

Yes

No

Check out our new [MyFreeTaxes Self-Employed Tax Guides](#) for additional guidance while you complete your return!



☐ I would like to opt-in to be contacted by United Way (optional).

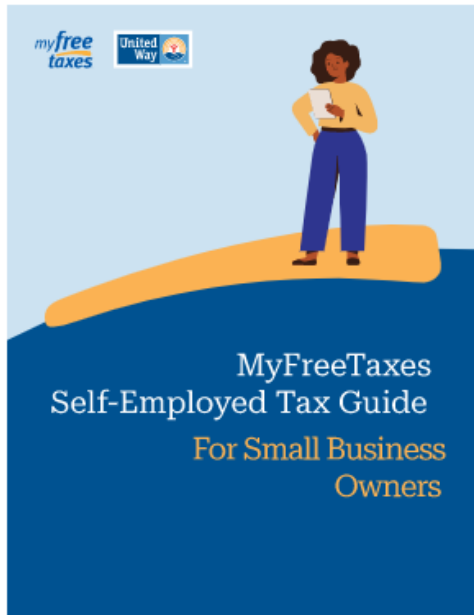
FILE NOW

MyFreeTaxes Self-Employed Tax Guides

Small businesses play a critical role in our economy, generating income and wealth that supports the financial needs of entrepreneurs, employees, and their families. However, the costs and stress associated with filing business-related taxes limit the positive financial impacts of self-employment for many entrepreneurs.

United Way created these guides to help more self-employed small business owners easily and accurately file their taxes for free using MyFreeTaxes.

We created three versions of these guides to meet the needs of various entrepreneurs.



Small Business Owners

Developed to meet the needs of the majority of entrepreneurs.

MyFreeTaxes Self-Employed Tax Guide

For Small Business Owners

Small businesses play a critical role in our economy, generating income and wealth that supports the financial needs of entrepreneurs, employees, and their families. However, the costs and stress associated with filing business-related taxes limit the positive financial impacts of self-employment for many entrepreneurs.

According to the IRS, in 2019, there were over 27.8 million sole proprietorships (also called self-employed individuals) running businesses in the United States. In a way, this isn't surprising. To start a business as a sole proprietor, you typically just need to start doing your business. That is, there's little or no registration needed and no incorporation forms to fill out. Sole proprietorships can include anything from a person selling crafts on Etsy to a take-out restaurant with multiple employees. They all have one thing in common- they report their business earnings (and determine their taxes) using a Schedule C form.

United Way created this guide to help more self-employed small business owners easily and accurately file their taxes for free. Designed for both full-time and part-time entrepreneurs, **this guide will help you self-prepare your taxes for free using MyFreeTaxes.**

This guide has two parts.

Part I: Getting Ready for Tax Season focuses on what you need to know about taxes and how to prepare for tax season.

Part II: Filing Your Return Online offers step-by-step instructions on how to use MyFreeTaxes to complete your return online.

This guide will help you take each step in your tax-filing journey. The layout is in a simple question-and-answer format based on questions frequently posed by other entrepreneurs. To answer the questions, we drew upon official U.S. Internal Revenue Service guidance as well as other nationally recognized sources.

Review the guide below in PDF and video formats below. If you have questions while preparing your return, please contact our [Support](#) team.



Review Guide as a PDF



Review Guide Videos



MyFreeTaxes Self-Employed Tax Guide

For Gig Economy Entrepreneurs

Small business and self-employment play a critical role in our economy, generating income and wealth that supports the financial needs of entrepreneurs, employees, and their families. However, the costs and stress associated with filing business-related taxes limit the positive financial impacts of self-employment for many entrepreneurs.

In 2021, the gig economy included over 59 million workers in the US. The gig economy includes a variety of independent contractors, typically taking on short-term assignments such as Lyft or Uber drivers, DoorDash and other food app delivery drivers, Instacart workers, promoters, brand ambassadors, graphic designers, freelance writers, and more. Often, gig economy entrepreneurs have other full or part-time “regular” jobs where they work as employees, but increasing numbers are making their self-employment gigs their only jobs.

United Way created this guide to help more self-employed people, including small business owners engaged in the gig economy, easily and accurately file their taxes for free. Designed for both full-time and part-time entrepreneurs, **this guide will help you self-prepare your taxes for free using MyFreeTaxes**



This guide has two parts.

Part I: Getting Ready for Tax Season focuses on what you need to know about taxes and how to prepare for tax season.

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This guide will help you take each step in your tax-filing journey. The layout is in a simple question-and-answer format based on the questions frequently posed by other entrepreneurs. To answer the questions, we drew upon official US Internal Revenue Service (IRS) guidance as well as other nationally recognized sources.

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Review Guide Videos



MyFreeTaxes Self-Employed Tax Guide

For Home-Based Child Care Businesses

Small businesses play a critical role in our economy, generating income and wealth that supports the financial needs of entrepreneurs, employees, and their families. However, the costs and stress associated with filing business-related taxes limit the positive financial impacts of self-employment for many entrepreneurs, including home-based child care providers.

United Way created this guide to help more owners of home-based child care businesses easily and accurately file their taxes for free. Designed for both full-time and part-time entrepreneurs, **this guide will help you self-prepare your taxes for free using MyFreeTaxes.**

This guide has two parts.

Part I: Getting Ready for Tax Season focuses on what you need to know about taxes and how to prepare for tax season.

Part II: Filing Your Return Online offers step-by-step instructions on how to use MyFreeTaxes to complete your return online.

This guide will help you take each step in your tax-filing journey. The layout is in a simple question-and-answer format based on the questions frequently posed by other home-based child care providers. To answer the questions, we drew upon official US Internal Revenue Service guidance (including their audit guide for child care providers).

Review the guide below in PDF and video formats below. If you have questions while preparing your return, please contact our [Support](#) team.



Review Guide as a PDF



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MyFreeTaxes Self-Employed Tax Guides Outreach and Promotion

Outreach and Promotion

We rely on our partners to reach filers in your community!

- Promote the MyFreeTaxes Self-Employed Tax Guides at your VITA sites
- Promote on your social channels and via your newsletter
 - Social cards for the tax guides are available on the partner portal – combined or guide version-specific



Resources

MyFreeTaxes: www.myfreetaxes.com

MyFreeTaxes Self-Employed Tax Guides: www.myfreetaxes.com/selfemployed

MyFreeTaxes Support: www.myfreetaxes.com/support

MyFreeTaxes Partner Portal: access our partner materials, including outreach content at www.unitedway.org/myfreetaxes/partners

Outreach materials: www.unitedway.org/myfreetaxes/partners/materials/partner-promotion

Partner data: www.unitedway.org/myfreetaxes/partners/data

Partner webinar: www.unitedway.org/myfreetaxes/partners/quick-tools/webinars

Q&A

Email any remaining questions to Partners@MyFreeTaxes.com



LIVE UNITED

Thank you

