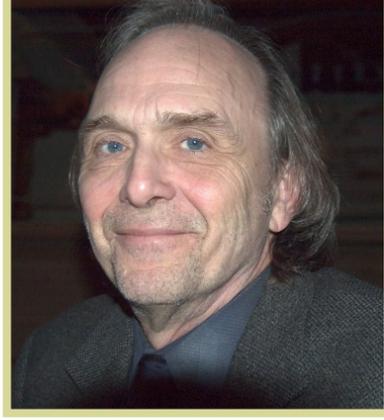


## Update: Mission Moment—The Tax Man

### Dr. Schwarz: "Hooked on LUM"

The LUM Tax Assistance Program's success is due to the quality and passion of our volunteers. One such volunteer is Dr. Leroy "Lee" Schwarz, who is the Louis A. Weil, Jr., Professor of Management, Krannert School of Management, Purdue



*"I went into it thinking that I wanted to 'give' but wound up getting back so much more than the little bit I gave."*

University. Three years ago, Lee was listening to a local public radio interview when the LUM coordinator for the Tax Assistance Program described the many volunteer opportunities during tax season. He decided that very day to answer the call. "I was looking for a meaningful way to use my expertise and talents to serve the community," Professor Schwarz said.

Once Lee met with the LUM coordinator, he realized this was "serious business". Each volunteer tax preparer must pass one or more tests in order to become certified by the IRS. He was given a thick (2.5 inches) packet and went to work. Lee thinks the IRS certification exams are "tough and tricky" in parts; but he became certified and started working with clients exactly three years ago. He was impressed with how professional and organized the service is. "I was inspired by veteran volunteers like Ann Pelletier and Andrea Schmidt," Professor Schwarz said.

There were several things Lee learned about the community, LUM, tax preparation, and himself during this process. Some of those are as follows:

- LUM offers a unique service because of how this program complements other LUM programs like the Good Samaritan Program, Case Management, and the Emergency Shelter
- LUM volunteers become experts in the specific IRS tax credit allowances that only apply to low income like the "Earned Income Credit"
- LUM tax volunteers give their clients

personal one-on-one counseling and spend as much time as needed to complete the tax return

- Most individuals and families who use the LUM tax assistance program need their tax return money for necessities like rent, food, work clothes, and car payments and not luxuries
- Lastly, he realized that the LUM tax assistance program is not providing for luxuries but rather is providing basic sustenance

Lee particularly enjoys being a LUM tax volunteer because of the joy and fulfillment it gives him. "The LUM tax assistance team is serious about the work, but we have fun too." He also enjoys celebrating with his colleagues when they are able to assist a client in getting a large tax return. Professor Schwarz stated "I love that we have so much fun and good cheer." He has many great stories and memories and has discovered he gets back so much satisfaction from this work and has met many good people in the past three years.

Lee has also become slightly "hooked" on LUM in general. In addition to volunteering an average of 15 hours per week during tax season, he is a trained substitute bus driver for the LUM After School Program and a Good Samaritan case advocate once a week, year round. Professor Schwarz also volunteers in the community teaching English and math and promoting literacy.

The LUM Tax Assistance Program is powered by highly skilled and expertly-trained volunteers. Lee's story is just one of dozens (40+) volunteers who serve each year during tax season. The LUM Tax Assistance Program begins next week and continues through mid-April. We are sincerely grateful for the volunteers and coordinators of this valuable and successful program.

### Tax Assistance Program

Since 2002, the [LUM Income Tax Assistance Program](#) has offered free tax help to people in Tippecanoe County with low-to-moderate income, senior citizens, persons with disability, those who have limited English proficiency and others who need assistance in preparing their own tax returns. At the LUM free tax help site, taxpayers will get one-on-one help from IRS-certified volunteers who prepare their taxes for them.

**LUM Tax Assistance will be offered from Tuesday, January 22 – Thursday, April 11, 2013.**

LUM also offers a self-prepare option for people to do their own taxes for free using web-based tax preparation software starting Wednesday, January 30, 2013. (Click [HERE](#) to check it out.)



In most cases clients receive their refunds in less than 21 days. Individuals and families qualify for this free service if their income is less than \$50,000 and they live in Tippecanoe County. The LUM Volunteer Income Tax Preparers can also inform taxpayers about special tax credits for which they may qualify such as [Earned Income Tax Credit](#), [Child Tax Credit](#), and [Credit for the Elderly or the Disabled](#). Volunteer tax preparers make sure individuals get the Earned Income Tax Credit they deserve; and assist in filing taxes electronically and direct deposits when there's a refund.

In 2012, LUM's 10<sup>th</sup> season of providing free tax preparation services, more than **40 volunteers helped 1,563 low-income households** file their state and federal tax returns. Two million four hundred thousand dollars in refunds were provided to those households, whose adjusted gross annual income for 2011 averaged less than \$14,000.

There can be no understating the value of this free service, and the accompanying tax refund, to low income working families. Basic bills are paid, savings accounts are opened, individuals have used their refunds to enroll in Ivy Tech and several individuals have even chosen to stop paying rent and invest instead in a home of their own. LUM would not be able to offer this service without the volunteers who last year made this vital LUM program such a success.



The 2013 [LUM Tax Assistance Program](#) is led by Sandra Dunn-El and Ron Smith.

### ASP Hot Need – Snacks



The [LUM After School Program](#) needs to fill their cupboard with Snacks for the new year:

- Cheese sticks
- Crackers: Goldfish, Peanut butter, Cheese, Animal
- Fresh vegetables, Fresh fruit, Dried Fruit like raisins
- Fruit snacks, Fruit roll ups, Fruit bars
- Juice—100%, Juice boxes/pouches
- Popcorn, Pretzels, Cookies
- Rice Krispy treats, Granola bars, Snack bars

The complete ASP Wish List is posted online, click [HERE](#). You may also sponsor educational, cultural and recreational enrichment trips for the children to various locations like Imagination Station, a local pool, or a holiday party (Valentine's Day, St. Patrick's Day, etc.).

For more information, call or email Cindy Haley at (765) 423-2691 or [chaley@LafayetteUrbanMinistry.org](mailto:chaley@LafayetteUrbanMinistry.org).

### Purdue Row-A-Thon—This Saturday



[Purdue Rowing Team](#) presents "Row-a-thon" in support of the [LUM Good Samaritan Fund](#) (formerly known as the Centralized Emergency Fund). **Purdue Row-a-thon 2013** is schedule for:

- **THIS Saturday, January 19<sup>th</sup>**
- **9 a.m. to 9 p.m.**
- **Tippecanoe Mall, Lafayette** (inside near Macy's)

"Row-a-thon" is a rowing marathon of 26 miles in three hours on indoor rowing machines. Stop by the Mall on Saturday and check it out. John Reidy, the Purdue Crew Club president, says "please **Pull with Us** to support this effort...and show your support for your Purdue Crew Boilermakers as they pull for our community's less fortunate."

Please make checks payable to **Purdue Crew Club** and mail your checks to:

**Purdue Crew  
355 N. Martin Jischke Drive  
West Lafayette, IN 47907**

Thanks to John Reidy, Head Coach David Kucik and the entire rowing team for supporting LUM. (Please note: the funds raised from Row-a-thon will be split 50/50 between LUM and Purdue Crew Team.)



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