

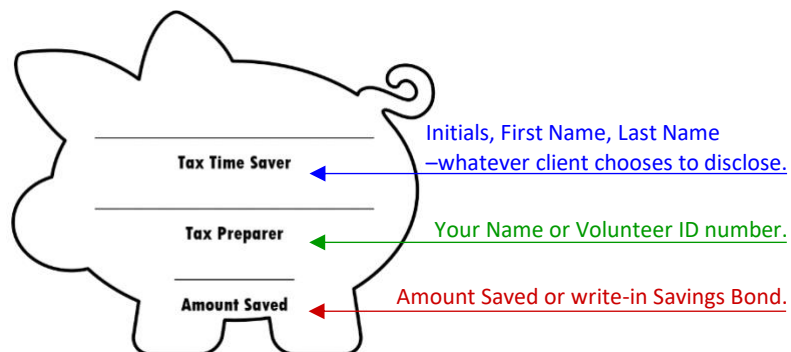
TAX TIME SAVINGS

Instructions For Tax Preparers

- During Intake, Tax preparation, and QR –mention Tax Time Savings and how the taxpayer will be awarded a **\$10 HEB Gift Card** if they save any portion of their refund, or purchase a \$50 savings bond.
 - There is no minimum requirement as to how much a client needs to save.
 - Don't forget to discuss how having a savings account can accumulate as emergency funds or, by purchasing a savings bond, how it may benefit their children.
- Once the taxpayer decides to save, they will have to split their refund.
 - This will populate **IRS Form 8888**. This is the same form if they decide to purchase a savings bond.
- Once **Form 8888** is complete, let your manager know that the client qualified for a refund and is allocating a portion to a savings account or purchasing a savings bond.
 - The best time to do this is after a return has been QR'ed.
- **The Tax Site Managers have the gift cards secured at their desk.**
 - Managers will have clients sign for their gift card.
- Clients will also receive a pink flyer from the manager that goes over the *Save Your Refund* promotion, a nationwide opportunity* to **win a grand prize of \$10,000!**
 - *To be entered into national drawing, the client must save \$50 or more of their refund into a qualified savings product.
 - Instructions on how to sign up will be outlined on the flyer.
 - The flyer also includes information on savings bonds and their benefits.

BONUS – If you are a tax preparer at the **Community Financial Centers**, North or South, please fill out a piggy bank with your clients and add it to the Tax Time Savings board at these locations.

Example of Piggy Bank:



Thank you so much for helping our clients save during tax season!