

LIVE DDocument— save a copy before you edit please

[Date]

[Bank Representative's Name] [Bank Name] [Bank Address] [City, State, Zip Code]

Dear [Bank Representative's Name],

I hope this letter finds you well. My name is _____, and I am reaching out on behalf of _____', Volunteer Income Tax Assistance (VITA) program.

VITA provides free tax preparation services to low- and moderate-income individuals and families with incomes under \$_____, ensuring they receive all the credits and deductions they are entitled to. Last year, we helped over _____ taxpayers file their tax returns. This service not only helps in maximizing their refunds but also alleviates the financial burden of tax preparation fees—fees saved that can be used for food, housing, utilities, dependent care, emergencies, savings and more.

We plan to serve more taxpayers throughout _____ this upcoming tax season and we also want to focus on underserved communities, including _____ (ex: Hispanic and Haitian populations.)

By partnering with our VITA program, [Bank Name] may be eligible for favorable consideration under Community Reinvestment Act (CRA) rules. We would welcome the opportunity to discuss how we can collaborate effectively to achieve our shared goals. Please let me know a convenient time for a meeting or call, and I will be happy to accommodate.

Additionally, here are some ideas of how we can partner:

1. Provide financial education classes aimed at enhancing financial literacy among community members (in English, Spanish, or Haitian Creole).
2. Encourage your employees to participate as volunteer tax preparers (we provide the training).
3. Promote VITA to your clients — we can provide the marketing material.
4. Host a VITA site or event at your bank, or become a drop-off/pickup site for hard-to-reach communities.
5. Support United Way's VITA program growth or Split Your Refund program through financial support.

Do you have any other ideas or suggestions for collaboration? We are open to exploring further opportunities that align with our mutual objectives.

I look forward to the possibility of working together with [Bank Name] to make a positive difference in our community.

Sincerely,