

# CPA VOLUNTEERS HELP EASE THE BURDEN FOR FAMILIES OF PERSIAN GULF TROOPS

*CPA state society members prepare state and federal tax returns for dependents of troops serving in the Middle East.*

**by John L. Daidone**

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he CPA profession has stepped forward to assist the families of reservists, National Guard members and active military personnel serving in the Middle East through programs set up by a number of state societies and their chapters. CPAs are providing tax filing services and, in some states, personal financial counseling. Because military personnel stationed in the Persian Gulf automatically qualify for tax extensions, these programs can continue well beyond the normal tax filing season.

#### **The Pennsylvania Institute of CPAs**

The Pennsylvania Institute is a strong advocate of the tax assistance effort. The program operates at the chapter level through special task forces. CPA volunteers are referred to their particular chapter's task force, which then assigns them to an individual needing tax assistance or advice on other financial matters. Members are preparing 1990 standard state and federal tax returns for the families.

The effort is coordinated with the state's CPA firms, the state's military installations

and the Internal Revenue Service's public affairs division in Washington. An IRS document, "Tax Issues of Concern to Military Reservists and Others Affected by Middle East Events," has been distributed to CPA firms and military installations along with other pertinent material. Tax information and the society's offer of assistance are included in mailings to reservists and National Guard members and their families.

Pat Walker, manager of communications, said the initial response from members was excellent. Less than a week after announcing the program, more than 250 members called to volunteer. "People feel so helpless watching the war so far away. Our members wanted to do something to help," Walker said.

Walker explained the project was devel-

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oped as an outgrowth of the successful USA-GIVE program, which was a cooperative effort of the AICPA, state societies and other organizations to provide financial, legal and psychological assistance to families of U.S. hostages in Iraq and Kuwait. "After the hostages returned, we received a call from a member whose husband is a reservist," Walker said. "She wanted to know if we could do something for the families of reservists."

Walker said the program has generated between 20 and 40 calls a day from families seeking help since it was first announced in January. The Pennsylvania Institute would like to see other state societies implement similar programs. To that end, it recently sent information packets to the other societies so they could launch their own efforts. The packet includes the society's public relations plan, IRS background materials, sample letters and forms and a camera-ready logo that was specially designed for the program. As of early February, approximately eight societies had expressed interest, according to Walker.

#### **Ohio Society of CPAs**

One of the responding societies was the Ohio Society, which has since launched a similar effort. Pat Moore, assistant manager of chapter communications, said implementation of the Military Tax Assistance (MTA) program was swift. "We received the information from Pennsylvania on a Monday, and we had the program under way three days later," she said.

The society contacted several radio stations to promote the MTA program, and publicized it over a special tax line set up with a local television station. Within 48 hours, the society received seven calls from families of reservists. "The response from the reservists' families really caught our

eye," she said. She added, "The deployment of reservists was so swift that it left no time for these families to make financial and tax planning arrangements."

Like Pennsylvania's effort, the MTA program is being coordinated through special task forces set up through the society's 12 chapters. The Ohio Reservists Office assists the society by mailing information to the reservists' families. Materials are also distributed through other support groups.

#### **Texas Society of CPAs**

The Texas Society and its chapters include both the families of reservists and the families of active military personnel in its program. Society members participating in "Count on Us" provide counseling on topics such as identifying potential financial problems, maintaining a budget and personal financial planning.

The program, which was developed in September by the Dallas chapter, is particularly active in the Dallas and Austin areas. Ronney Reynolds, the statewide chairman for chapter public relations chairmen, said it is set up so that an individual who calls a chapter office will be assigned to a local CPA who has volunteered his or her services. About 100 volunteers across the state participate, according to Vicki Morgan, public relations specialist.

The society and chapters publicize the program through various means. In Dallas, the chapter coordinators contacted the local military family center, which typically provides counseling and other family services to military personnel. Family center personnel promoted the CPA program through their monthly newsletter, a specially developed flyer, and by announcements at periodic family briefing sessions held by the center for military families.

Reynolds said the program is especially

## EXECUTIVE SUMMARY

■ THROUGH ITS STATE societies, the CPA profession has instituted programs to offer free tax assistance and, in some states, financial counseling to families of military personnel stationed in the Persian Gulf.

■ THE PENNSYLVANIA Institute has been a strong advocate of the tax assistance effort and supports a program in which member volunteers prepare state and federal tax returns for families

of Pennsylvania reservists and National Guard members.

■ THE OHIO SOCIETY'S Military Tax Assistance (MTA) program is similar. The Texas Society and Massachusetts Society programs include reservists, National Guard members and active military personnel. The New York Society works closely with the Red Cross, veterans hospitals, the IRS and the military.

helpful for families where the individual serving in Operation Desert Storm was the person who took care of the family finances. "In a typical household, one person pays the bills," he explained. "If that member of the family is ordered to the Middle East, handling the finances can become difficult for the remaining family members."

Reynolds said the demand for family tax assistance may be greater in Texas than in other states. He notes that the military personnel coming out of installations in San Antonio, Austin and Killeen constitute the country's highest percentage of local population serving in Operation Desert Storm. In its first five months, the program generated about 100 calls, he added.

#### **Massachusetts Society of CPAs**

The Massachusetts Society developed its own program for families of the military, reservists and the National Guard. "CPA GAIN" (Gulf Assistance Information Network) had approximately 70 members signed up as of early February, according to Alison Lewandowski, communications and public relations assistant.

Lewandowski said the society is working closely with the state's military bases, conducting educational seminars for affected family members. Among the features of CPA GAIN are a confidential, toll-free telephone line for general information and a packet containing items such as a Q&A brochure on federal tax issues concerning families of Operation Desert Storm. "Most of the questions we've been getting have been on financial planning," Lewandowski said.

Harry Paine, chairman of the ad hoc Persian Gulf assistance committee, gave a presentation to eight families at a Massachusetts military base in early February. Paine said their concerns ranged from basic state tax issues to financial planning and power of attorney questions. "One woman at the presentation was from Massachusetts. However, she married someone from Nebraska and they were stationed in Hawaii," he explained. "She didn't know what state forms she had to fill out."

Paine says some of the attendees were also having problems getting the W2s for the individuals who were shipped out. He made them aware of a special IRS form where spouses could attach the last pay stub in place of the W2. Paine said that the society is planning to conduct more presentations on Massachusetts military bases, and will even do one-on-one counseling if requested.

#### **New York State Society of CPAs**

"Operation Tax Relief" in New York has been warmly received by the media, according to Danielle D'Angelo, public relations manager. One way the society has publicized its tax assistance program is through its own public service announcement scripts for about 40 radio stations in the state. The scripts were sent out with tax season public service announcements and have been getting a lot of airtime.

Like the other societies, the New York State Society is working closely with the military, the IRS, veterans hospitals and the Red Cross to get the word out to family members. After just three weeks, the society had heard from about 30 families, D'Angelo said. She added that many society members were planning to provide tax filing services for families at an IRS seminar at Fort Totten in Queens in late February.

#### **Wisconsin Institute of CPAs**

The Wisconsin Institute sent out some 500 solicitations for volunteers to CPA firms and, as of early February, had received between 150 and 200 positive responses. The society also joined with the family assistance center of the Wisconsin National Guard to distribute about 3,500 flyers to family members of reservists and active military personnel. Linda Bielski, manager of member and field services, said some 30 responses were received in three weeks.

#### **West Virginia Society of CPAs**

On March 7, 1991, the West Virginia society, in conjunction with the IRS and the National Guard, conducted a statewide tax filing clinic for the families of military personnel serving in the Persian Gulf. Diane Slaughter Hamilton, administrative assistant for public relations, says the effort was the first to include the National Guard as a full partner. The National Guard provided space for the workshops at seven sites throughout the state and assisted society chapters in contacting the families.

#### **Georgia Society of CPAs**

In Georgia, some chapters are working informally with government agencies to provide tax assistance to families, said Jim Martin, executive director.

The Savannah and Southeast Georgia chapters, for example, engaged 20 firms to participate in tax preparation workshops. Families needing tax help were referred to a participating CPA by military personnel at installations within those chapters. ■