



**ANNUAL
REPORT
2023**



Letter From Irene



Dear Friends,

We had a terrific year at Ariva in 2023 and we're very excited about what 2024 will bring. Last year was our 20th Anniversary! We had a wonderful event in October, with many of our original partners and volunteers coming together with our community to celebrate our accomplishments over the years. It was also the 10th anniversary of the Ventanilla, our financial capabilities collaboration with the Mexican Consulate of New York, Mother Cabrini Health Foundation and M&T Bank!

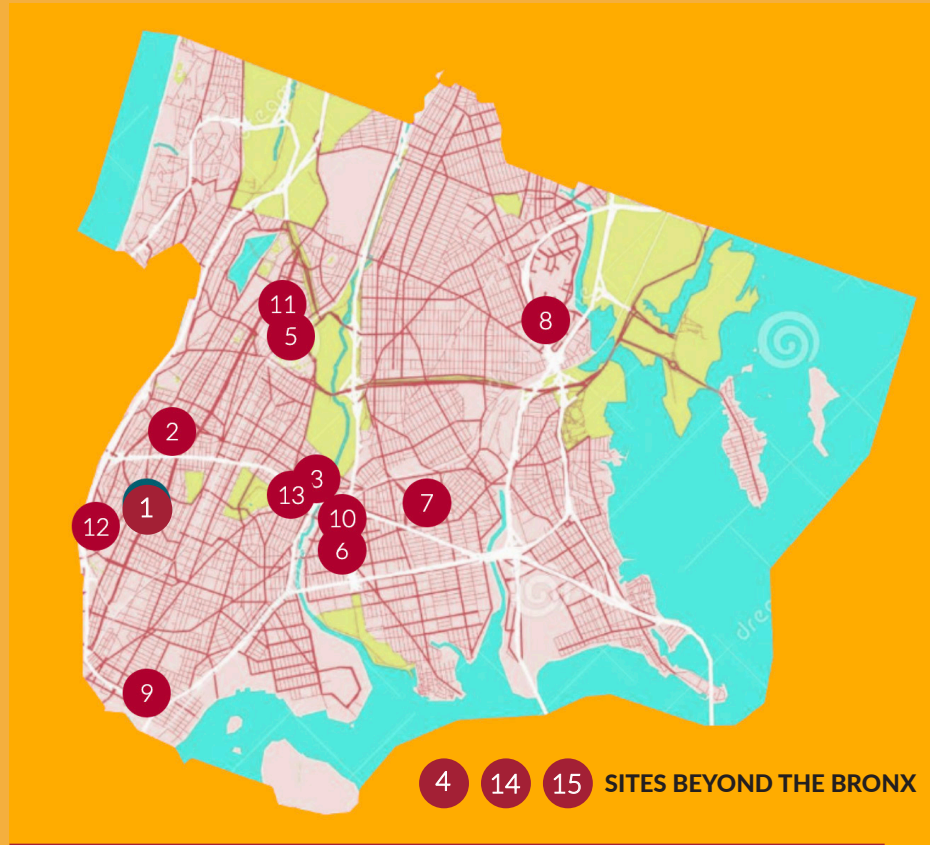
Time certainly flies, and we have come a long way from our early days when we filed a few hundred tax returns a year at our South Bronx office. We're still headquartered in the South Bronx, and now we also work in other neighborhoods and other boroughs. Last year, our programs served over 11,000 New Yorkers.

We saw a lot and learned a lot the past twenty years, and we spent some time this past year reflecting with our community partners on our shared experiences. In the report that follows, you can connect to those LinkedIn Live conversations. You can also learn about some of our plans for 2024. We have an exciting new project coming online which will offer free tax assistance exclusively to Bronx seniors. We also have a new partner in the New York State Department of State; with their support, we'll be expanding our financial counseling program in Bronx neighborhoods. You can read all about this and more in our annual report.

Best wishes in 2024.

Irene Baldwin

WHERE WE ARE



1 Ariva at Spring Bank
69 East 167th St.
Bronx, NY 10452
718-292-2983

2 Ariva at University Heights
67 West Tremont Ave.
Bronx, NY 10453
718-292-2983

3 Ariva at West Farms Housing
6 West Farms Sq.
Bronx, NY 10460
718-292-2983 Ext 1015

4 La Ventanilla at the Consulate General of Mexico in New York
27 East 39th St.
New York, NY 10016
212-217-6424

5 Ariva at Part of the Solution (POTS)
2450 Grand Concourse Avenue
Bronx, NY 10458
929-566-7963 (tax)
718-690-9873 (financial counseling)

6 Ariva at Youth Ministries for Peace and Justice (YMPJ)
1384 Stratford Ave.
Bronx, NY 10472
718-328-5622

7 Parkchester Enhancement Program (PEP)
1525 Unionport Rd.
Bronx, NY 10462
718-409-1619 (tax)
718-690-9873 (financial counseling)

8 Ariva at Jasa
2049 Asch Loop
Bronx, NY 10475
718-320-2066

9 Ariva at Eastside House
201 St Ann's Ave.
Bronx, NY 10454
718-304-0155 ext 560

10 Bronx River Community Center
1619 E 174th St.
Bronx, NY 10472
718-589-0553

11 Ariva at Serviam
2848 Bainbridge Ave.
Bronx, NY 10458
718-292-2983

12 Ariva at Bridge Builders Community Partnership
156 West 164th St.
Bronx, NY 10452
718-690-9873

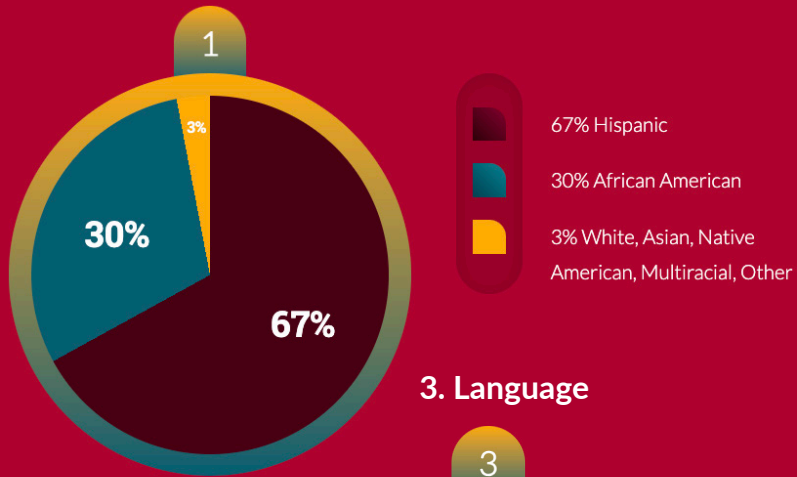
13 Ariva at West Farms
1 West Farms Sq.
Bronx, NY 10460
718-618-4589
718-618-6562

14 Consulate General of Colombia in New York
10 E 46th St
New York, NY 10017
718-690-9873

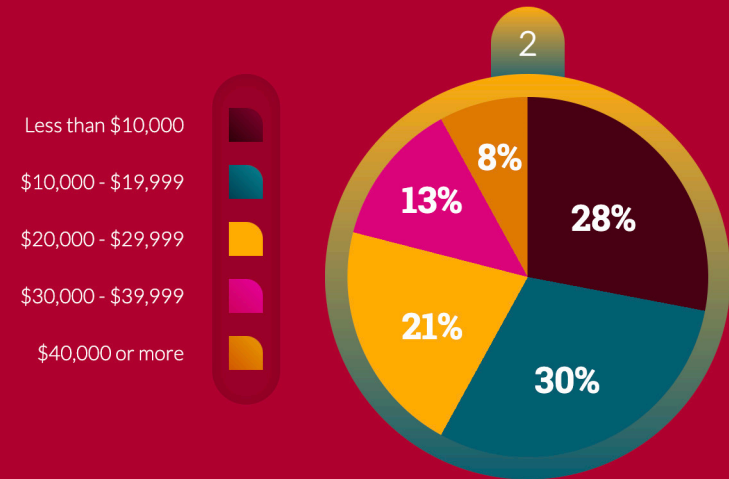
15 Center for Urban Community Services (CUCS)
198 East 121st St.
New York, NY, 10035
718-690-9873

WHO WE SERVE

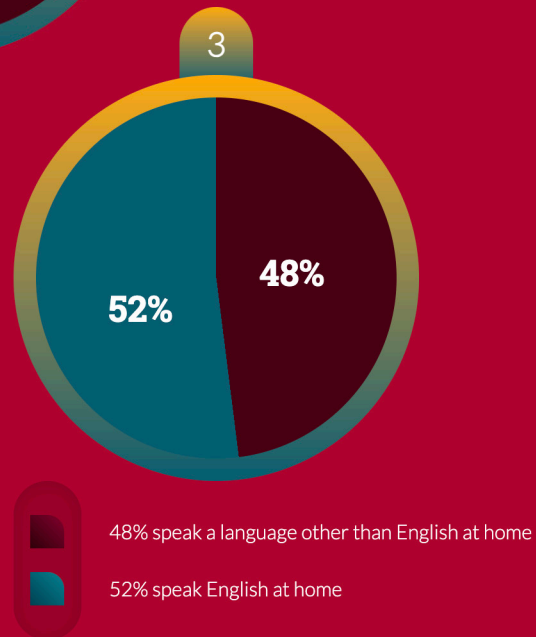
1. Race/Ethnicity



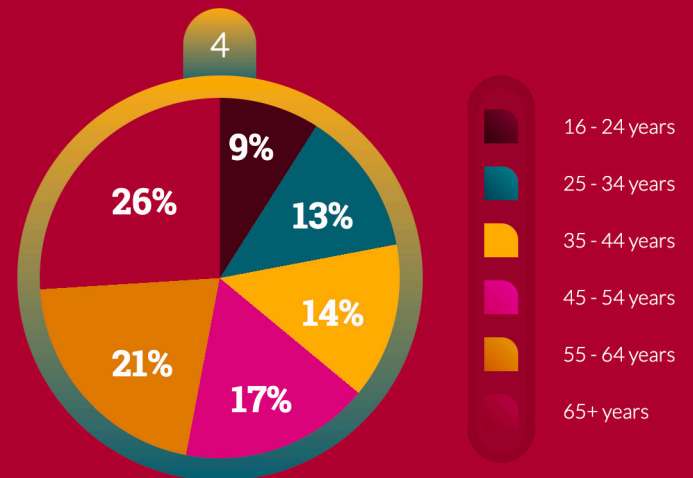
2. Income



3. Language



4. Age



OUR PROGRAMS

TAX PREPARATION

Our ITIN Program: Ariva's Certified Acceptance Agents help recent immigrants obtain and renew their ITINs. When newcomers obtain an ITIN and file their taxes, it opens the door to a better financial future. To help the NYC immigrant community thrive, we also help them understand the US financial system when they apply for ITINs and file their taxes with us. In 2023, 604 individuals applied for an ITIN.

Supporting Seniors: The senior community needs and deserves easy access to free tax preparation services. Seniors are often targeted by scams and predatory actors, and Ariva provides a safe, high quality alternative to paid preparers. Last year, 28% of Ariva's tax clients were over 65. We look forward to providing free tax assistance at four dedicated sites for seniors in our community in 2024.

Here for the Bronx: We are committed to bringing tax dollars back to the Bronx community, so we work hard to make our free tax preparation services available to as many Bronxites as possible. With the collaboration of our extraordinary community partners, in 2023 we operated 11 tax sites including three year round and two virtual sites.

FINANCIAL COUNSELING

Reaching Across the Bronx: In 2023, we provided one-on-one financial counseling to our neighbors at 13 locations in the Bronx. Our clients received guidance on improving their budgets, savings, credit, information about the Housing Connect program process, and building stronger applications for the NYC housing lottery. Clients were also referred to our VITA program to file taxes and apply for ITIN numbers.

Our Commitment to Immigrant Communities: In 2023, we continued our commitment to supporting New York City's hard-working immigrants. We work and partner with several Latin American Consulates and immigrant serving organizations, including the Mexican Consulate, the Colombian Consulate, and the Consulate of El Salvador. We provide one-on-one counseling, support in applying for the NYC housing lottery, and free tax preparation.

Helping New Yorkers Access Housing: In 2023, our financial counselors provided financial counseling and information about affordable housing beyond the Bronx to residents across NYC. Our counselors support affordable housing seekers in building stronger housing applications by working on their budgets, savings, credit and the application for the NYC Housing Connect program. Our team participated in 29 events in 2023, including community fairs, pop-up events, presentations, and workshops.

Empowering Entrepreneurs: In 2023, we supported entrepreneurs and small business owners in the Bronx and at the Mexican Consulate of New York. Our entrepreneurs have access to small business workshops and one-on-one business counseling where they learn about business planning, financing and capital options, the Employer Identification Number (EIN), and self-employment resources, among other topics.

OUR VOLUNTEERS

We are grateful to all the volunteers who supported our tax season this year!



“The most important thing to me as an Ariva volunteer was to see people coming because they needed the service being provided. For some people, this is the only savings they may have. You want to make sure you’re doing their taxes accurately to ensure they are getting back their proper refund. It is a pleasure to see the smile on people’s faces and their response when they realize they are getting a refund or don’t owe anything. There is a certain level of integrity when it comes to taxes at Ariva. It’s all about the service.”

Madison Plummer, Volunteer



“I’ve always liked serving. Coming from a small family - my parents are from the Dominican Republic - we rely on community. I grew up with that, your village, your community, you help one another... [Many clients at Ariva], they don’t have a banker who speaks their language. Spanish is my first language. It makes me happy that they are comfortable and can ask questions [while I prepare their taxes]...People are waiting in line in the cold to get a \$63 refund from the state, so you know it makes a big difference to them. It’s a really wonderful project. Every year I go back.”

Carmen Paulino, Volunteer

OUR BOARD

OFFICERS

Heng Ly
Chair

Steven Flax
Vice Chair

Susan Grbic
Treasurer

Astrid Andre
Secretary

DIRECTORS

Walter Blenman

James Buckley

Josh Garcia

Natalie Lozada

Myriam Rebling

Teri Wade

LaKia Williams

OUR STAFF

ADMINISTRATION

Irene Baldwin
Executive Director

Angelica Muñoz
Executive Assistant

Roy Nielsen
Fiscal Director

Bellamy Puch
Fiscal Associate

TAX PROGRAM

Nilda Bonilla
Administrative Assistant

Libretta Champagne
Senior Tax Preparer

Sam Johnson
Volunteer Project Coordinator

Maribel Montilla
Tax Program Director

Madelin Quezada
Senior Tax Preparer

FINANCIAL COUNSELING

Felix Arellano
Program Manager

Matteo Caramazza
Financial Counselor

Sidy Diakhate
Senior Financial Counselor

Sabrina Escobar Flores
Financial Counselor

Bradley Fernandez
Community Outreach Associate

Sharon Fortis
Program Manager

Elizabeth Gomez Castrillon
Financial Counselor

Cameron Heaven
Financial Counselor

Daysi Lopez Castillo
Financial Counselor

Adelaida Morin
Senior Program Director

Jose O'Boyle
Administrative Assistant

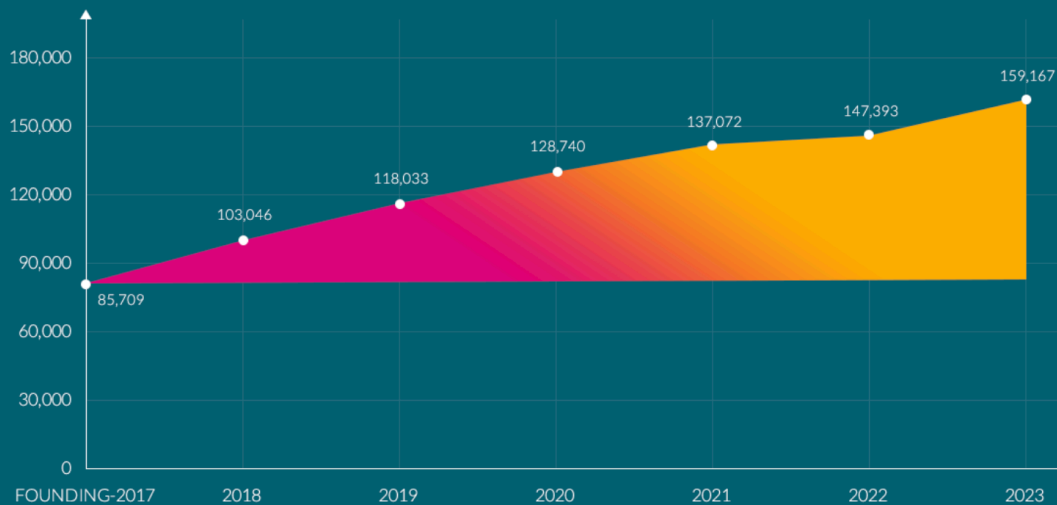
Fernando Zea
Financial Counselor

BY THE NUMBERS

2023

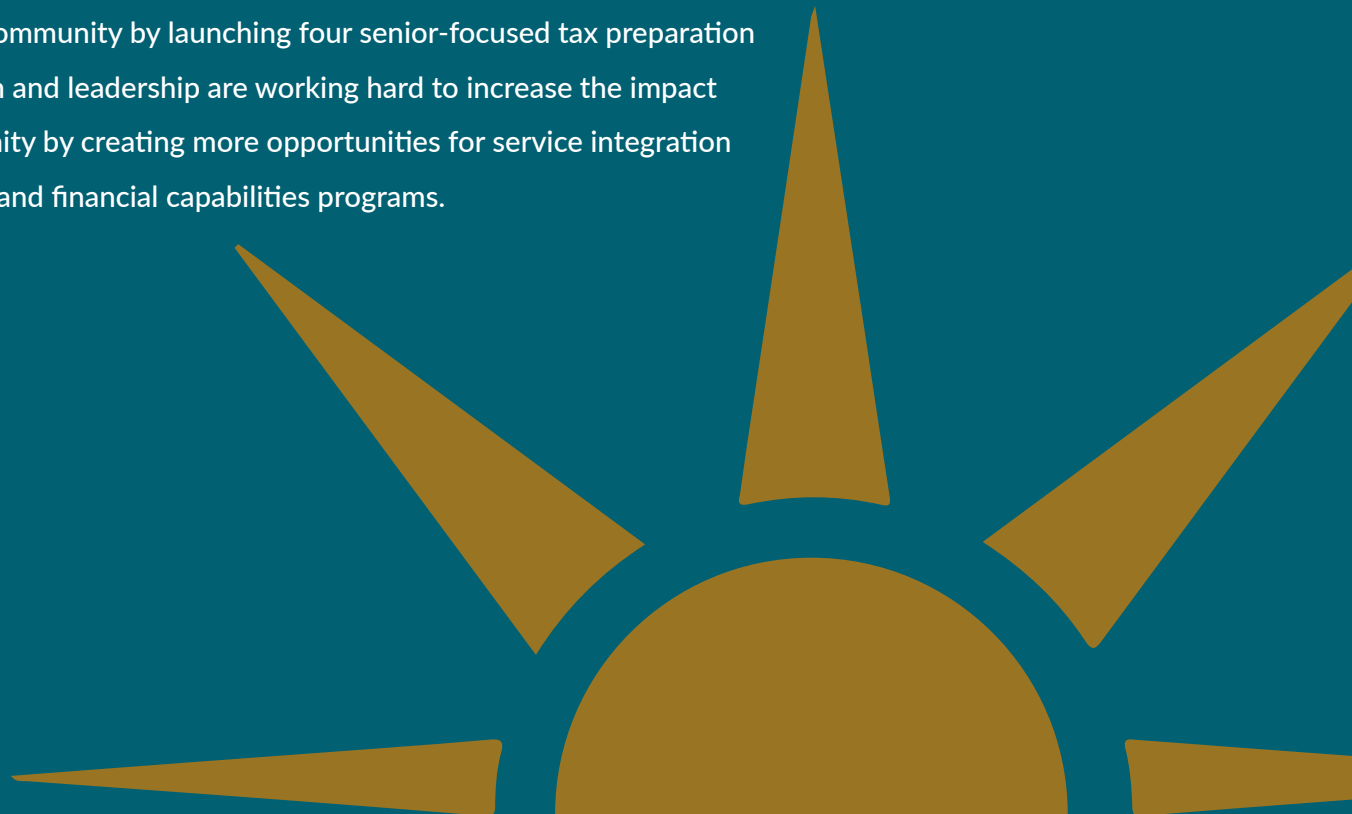
8,279 Tax returns filed	3,495 Financial counseling clients served	565 Tax Clients also enrolled in Financial Counseling	329 People have received entrepreneurship counseling through our programs
-----------------------------------	---	---	---

OVER THE YEARS



VISION FOR 2024

In 2024, we look forward to the beginning of our next 20 years! We'll continue to deepen our presence in the Bronx and respond to the stated needs of our community by launching four senior-focused tax preparation sites. Our team and leadership are working hard to increase the impact in our community by creating more opportunities for service integration across our tax and financial capabilities programs.



CELEBRATING 20 YEARS



Last year, Ariva celebrated our 20th Anniversary! Over the past two decades, we have filed over 130,000 tax returns and have provided financial counseling to almost 25,000 individuals.

We commemorated this milestone at our 2023 Toast to Ariva celebration, where we raised more than \$40,000 to support economic justice, opportunity and inclusion in the Bronx and beyond.

We also celebrated this milestone year by sharing our experiences in a LinkedIn Live series featuring conversations with some of our wonderful partners.





LINKEDIN LIVE SERIES

ARIVA PRESENTS THE ADVANCING ECONOMIC JUSTICE SERIES In Partnership with **Qualitas**

Supporting NYC Micro-Entrepreneurs




Join Sharon Fortis and Myriam Rebling for a discussion about supporting hardworking, small-scale business owners across New York City.

WEDNESDAY, SEPTEMBER 20TH, 2023, 12 PM EST, LINKEDIN LIVE

ARIVA PRESENTS THE ADVANCING ECONOMIC JUSTICE SERIES In Partnership with **spring bank**

Partnering for Social Change & Financial Inclusion in The Bronx




Join Demetris and Irene to learn how we have worked together toward the shared mission of financial inclusion in the South Bronx.

WEDNESDAY, OCTOBER 18TH, 2023, 12 TO 1 PM, LINKEDIN LIVE

ARIVA PRESENTS THE ADVANCING ECONOMIC JUSTICE SERIES Presentado por **CapitalOne**

Un aliado para las comunidades inmigrantes




Join Adetola Morin and Raúl Jorge Paz Bange for a discussion about supporting immigrant communities.

JUEVES, 30 DE NOVIEMBRE DE 2023, 12-1 PM, LINKEDIN LIVE

THANKS TO OUR PARTNERS

INDIVIDUAL

Astrid Andre
Irene Baldwin & Mike McGrath
Walter Blenman
Heather & Elsa Blumberg
Caitlyn Brazill
Diana Breen & Michael Ritter
Will & Lindsay Bressman
Caroline Bretter
Daeman Di Stefano
Aubrie Fennecken
Steven Flax
Friend of Ariva
Orville Froome
Joshua Garcia
Joan Gasser & Jim Buckley
Susan Grbic
Gary Hattem & Frazier Holloway
Jacqueline Hoeger
Angelica Juarez Sanchez
Heng Ly Family
Barry J. Mann
Colleen Marocco
Linda McLaughlin
Maribel Montilla
Adelaida Morin
Debra Putzer
Myriam Rebling
Gustavo Rodrigues
Kathleen Scott
Marie Sturm

Bob Swanton
Teri Wade
LaKia William

CORPORATE

Amalgamated Foundation
Apple Bank
B Storytelling
BankUnited
BNY Mellon
Capital One
Credit Builders Alliance
Dime Community Bank
Flagstar Bank
Fordham-Bedford Housing Corporation
Hanover Bank
JPMorgan Chase
M&T Charitable Foundation
Signature Bank
Spring Bank
University Neighborhood Housing Program
W&F Maintenance Corp.
West Farms Square LLC

FOUNDATION

Irene Ritter Foundation
Mother Cabrini Health Foundation
Robin Hood Foundation

GOVERNMENT

NYC Council Member
Amanda Farías
NYC Department of Consumer and Worker Protection
NYC Department of Housing Preservation and Development
NYC Department of Youth and Community Development
NYS Department of State
U.S Department of the Treasury- Internal Revenue Service

IN-KIND SUPPORT

Fordham Bedford Housing Corporation
Spring Bank
VanGennep Design

PARTNERS

163rd Street Improvement Council
Bridge Builders Community Partnership
Bronx River Community Center
Center for Urban Community Service (CUCS)
Consulado de Colombia en Nueva York
Consulate General of El Salvador in New York City

Consulate General of Mexico in New York City
Eastside House
JASA
La Jornada
Legal Hand Crown Heights
Legal Hand Jamaica
New York Cares
NYC Health & Hospitals
NYS Department of Taxation and Finance
Office of NYC Council Member Pierina Sanchez
Parkchester Enhancement Program
Part of the Solution (POTS)
Serviam Hall (Fordham Bedford Housing Corporation)
Spring Bank
Susan's Place
University Neighborhood Housing Program (UNHP)
West Bronx Housing and Neighborhood Resource Center
West Farms (Fordham Bedford Housing Corporation)
Youth Ministries for Peace and Justice (YMPJ)