



Job Description:

Certified Volunteer Tax Preparer

This is a volunteer seasonal position

(January - April)

Purpose:

These dedicated tax preparation volunteers donate their time to make sure those with limited incomes are able to complete tax returns in a timely fashion, enabling them to receive proper tax credits and refunds. Due to the up-front expense of hiring an accountant, many low-income families would not have their taxes prepared, if not for volunteers providing this tax preparation service. This is a challenging job, but the reward is great.

Roles:

- After certification training, provide basic tax return preparation for eligible taxpayers;
- Volunteers will provide free, high quality service and uphold the highest ethical standards to establish public trust.

Responsibilities:

- Attend new and/or refresher tax law training as needed, including training on the use of electronic filing software;
- Successfully pass a test on required tax law knowledge;
- Interview client regarding all income, deductions and allowable credit(s);
- Provide high-quality assistance to all taxpayers;
- Directly prepare taxpayer's return based on information provided by taxpayer and answer tax related questions;
- Prepare only those tax returns for which training and certification were provided;
- Prepare tax returns using electronic filing software;
- Ensure no compensation of any kind is accepted for the volunteer services provided;
- Maintain confidentiality of client information;
- Ensure on-site quality review is performed on completed returns prior to being returned to customer;
- Ensure a copy of the completed return is provided to the taxpayer.

Qualifications:

- Tax training and certification will be provided as needed. No prior tax preparation experience is necessary – just a desire to learn;
- Willingness to share time & skills. Consider volunteering a minimum of 2 to 4 hours per week for the Volunteer Tax Program from approximately mid-January through April 15;
- Basic computer skills for inputting tax return information;
- Interpersonal and interviewing skills. Interviewing skills training will be provided as needed;
- Friendly, dependable, and flexible;
- Bilingual volunteers a plus.