

Volunteer Tax Preparer Job Description

As a volunteer tax preparer in La Casa de Esperanza's Volunteer Income Tax Assistance (VITA) program, you will help low income individuals and families receive all the tax credits for which they're eligible. Many of these households desperately need their refunds to catch up in past-due rent, continue utilities, pay medical bills, and cover other critical basic needs. In 2013 La Casa's VITA program was able to bring back over \$3.1 million in tax refunds to the community. Please consider joining the VITA team to provide this much needed service to low income households.

VITA volunteers provide free e-filing of Federal & State tax return preparation, using an online system called Taxwise. All VITA volunteers become IRS-Certified! Each volunteer receives free tax training and are supported by VITA site staff at all times.

Role:

Volunteers have a responsibility to provide free high quality Tax Preparation service for eligible taxpayers, by establishing the greatest degree of public trust and upholding the highest level of ethical standards.

Tasks:

- Complete new and/or refresher tax law and tax software training
- Complete certification assessment at Basic or Advanced levels of tax law knowledge and Standards of Conduct (desired level completion is up to you)
- Interview clients & review Intake sheet to determine needed tax information
- Prepare tax returns based on information provided by taxpayer and answer tax related questions
- Maintain confidentiality of client information
- Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin, or disability.

Skills:

- Basic computer skills for inputting tax return information. (data entry)
- Basic and Advanced tax training and certification will be provided as needed.
- Friendly, Dependable, Flexible, and a Team-Player.
- Volunteer a minimum of 3-4 hours per week for the Volunteer Tax Program from approximately Mid-January through April 15, or at a minimum Mid-January through the end of February.
- Pride in performing tasks completely and accurately.
- Deal with the public in a helpful and supportive manner, including customer service skills.
- Bilingual is helpful, but not required