

# PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

## TAX PREPARER VOLUNTEER POSITION DESCRIPTION

The individual tax preparer works one-on-one with Prepare + Prosper (P+P) customers to prepare state and federal tax returns. They help customers access important tax benefits like the Earned Income Tax Credit (EITC). Preparers also serve as a trusted (and free) resource, ensuring customers file correctly. You see the impact of your volunteering immediately and gain hands on knowledge of the tax system.

### Role and responsibilities:

- Prepare state and federal tax returns using TaxSlayer software
- Direct appropriate customers to on-site financial services
- Maintain customer confidentiality, providing as much privacy as logistically possible
- Work cooperatively with P+P staff and other volunteers to provide high-quality service to customers

### Skills required:

- Knowledge of basic income tax preparation and meet one of the following criteria:
  - Experience filing your own tax return
  - Taken a tax law or income tax accounting course at the college level
  - Work in the accounting field
- Ability to effectively communicate and engage with customers
- Computer proficient
- Enjoy working in a diverse ethnic and socio-economic environment

### Commitment and timeline:

#### October - December, 2016

Attend one volunteer orientation

#### December 2016 + January 2017

Complete 16-18 hours of in-person and online training

#### January 2017

Successfully complete (open book) IRS certification tests

#### January 21 - April 15, 2017

Volunteer one 4-hour shift per week

### Locations

P+P operates 8 tax sites across the Twin Cities metro area, with locations in Minneapolis, St. Paul, Bloomington and Hopkins. Volunteers select a location that is convenient to work, home or school. Our main office is in St. Paul near the intersection of University Avenue W & Highway 280.



To apply, please submit an application via our website, [www.prepareandprosper.org/volunteer](http://www.prepareandprosper.org/volunteer).

You may also contact our volunteer resources department at [volunteer@prepareandprosper.org](mailto:volunteer@prepareandprosper.org) or 651-262-2163