

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 tax software
- Direct customers to on-site financial services
- Maintain customer confidentiality, providing as much privacy as 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:

November - December, 2017

Attend one volunteer info session

December 2017 + January 2018

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

January 2018

Successfully complete (open book) IRS certification tests

January 20 - April 15, 2018

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 sign up for an info session via our website, www.prepareandprosper.org/volunteer.

You may also contact our volunteer resources department at volunteer@prepareandprosper.org or 651-262-2163