

# 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:

#### April - May, 2017

Attend one volunteer orientation

#### May 2017

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

#### June 2017

Successfully complete (open book) IRS certification tests

#### June 6 - August 15, 2017

Volunteer one 4-hour shift per week

#### OR June - October, 2017

Volunteer two 4-hour shifts per month

### Locations

During the summer, P+P tax clinics operate only at our main office on University Avenue W & Highway 280.

2610 University Ave W.

St. Paul, MN 55114



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