

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

TAX PREPARER VOLUNTEER POSITION DESCRIPTION

THE ROLE

Tax preparers work one-on-one with customers to prepare state and federal tax returns. They help customers access important tax benefits like the Earned Income Tax Credit (EITC) and Child Tax Credit (CTC). 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.

RESPONSIBILITIES + SKILLS

Responsibilities of the role

- Interview customers to obtain all the information needed to accurately complete their tax return
- Prepare state and federal tax returns using TaxSlayer software
- Direct customers to speak with a Customer Support Volunteer about financial services
- Maintain customer confidentiality, providing as much privacy as possible
- Work collaboratively with P+P staff and other volunteers to provide high quality service

Skills Required

- Knowledge of basic income tax preparation and meet one of the following criteria:
 - Experience filing your own tax return
 - Have taken a tax law or income tax accounting course at the college level
 - Work in the accounting field
- Ability to provide a high level of customer service, effectively communicating and engaging with all customers
- Computer proficiency
- Enjoy working in racially and socio-economically diverse environment
- English proficiency required. Additional language proficiency desired but not required

COMMITMENT

- Attend an info session to learn all about P+P and the details of volunteering
- Complete 16-18 hours of training to prepare for your volunteer role
- Volunteer for one four-hour shift per week from June-August (with flexibility when needed!)

Attend one of our May information sessions. See dates and details in the application.

[Click Here to Apply!](#)