

PREPARE + PROSPER

Volunteer Financial Planner 2026 Tax Season

ABOUT PREPARE + PROSPER

Prepare + Prosper is a nonprofit that works with people to build financial well-being and address financial inclusion. Harnessing the power of volunteers and partnerships, we provide free tax preparation and financial services, products, and coaching, and work to change systems to create economic opportunity for everyone. We are committed to the principles of diversity, equity, and inclusion in our work.

Learn more about P+P at prepareandprosper.org.

THE ROLE

During Prepare + Prosper's weekly tax clinics, on-site volunteers have conversations with customers about financial topics and make referrals to trusted partners. One of these referral options is a one-time consultation with a Certified Financial Planner™. Volunteer Financial Planners receive these referrals and schedule a one-on-one meeting to provide individualized financial guidance.

Volunteers will be trained on the economic challenges P+P populations face, in order to communicate with equity and respect. Volunteers will gain valuable experience working with diverse communities.

RESPONSIBILITIES

- Call/email 1-2 participants per week during tax season to schedule a one-time one-on-one planning session (phone or virtual)
- Provide financial guidance based on customer objectives, including but not limited to: saving for retirement or education, building an emergency fund, retirement distribution options, insurance options, investing basics, managing inherited assets, and otherwise financially preparing for a life event.
- Respect financial decisions and goals, as well as confidentiality and privacy
- Engage in non-judgmental conversations with diverse populations
- Document customer contact attempts and description of consultations
- Refrain from soliciting clients or selling products

SKILLS REQUIRED

- Be a Certified Financial Planner™ professional in good standing with the Certified Financial Planner Board of Standards
- Ability to communicate with participants via phone and virtually
- Enjoy working with a racially and socio-economically diverse population
- Basic computer proficiency
- English proficiency required; additional language proficiency desired

COMMITMENT + TIMELINE

Training commitment

- Virtual training session January 27, 2026 5:30pm-9pm CST
- Approx. 1 hour of self-paced virtual training in January 2026
- One 30-minute check-in call in March 2026
- One 30-minute feedback call in May 2026

Volunteer commitment

- January 27 through May 31, 2026
- Approx. 2 hours of volunteering per week- contacting referrals, holding consultations, and documenting

HOW TO APPLY

[Complete this application.](#) After receiving your application, we will be in touch about next steps. Prepare + Prosper requires that all volunteers complete a background check before beginning their volunteer work.

Questions? Email sarah@prepareandprosper.org