



Volunteer Opportunity: Tax Preparer 2016

Reports to: Site Management Team

Program: The Campaign for Working Families (CWF) facilitates expanded income security to low and moderate wage earners in the Philadelphia region by increasing their access to the Earned Income Tax Credit (EITC) and other federal credits, low cost financial services and products and public benefits. During the tax season, the Campaign runs a number of VITA (Volunteer Income Tax Assistance) tax sites throughout Philadelphia and South Jersey, as well as Delaware and Montgomery Counties, managed by paid staff and supported by volunteer tax preparers that provide free tax preparation services for low and moderate income families and individuals.

Purpose of Position: As a Tax Preparer, you will assist working families in preparing their Federal and State tax return utilizing tax preparation software. Tax Preparers are trained to accurately apply tax law and identify any tax benefits for which the taxpayer qualifies.

Extent of Volunteerism: Seasonal, Part-Time. Mid-January to May 1, 2016. Training occurs in January 2016. Candidates must be available to attend required training(s).

Locations: Philadelphia (20 sites); South Jersey (15 sites); Delco (1 site); Montco (1 site)

Responsibilities:

- Certify at the Basic or Advanced IRS level of tax return preparation.
- Attend training to become proficient in the use of TaxWise online software program.
- Interview taxpayer to determine if all income, deductions and allowable credits are claimed.
- Prepare tax returns using TaxWise software.
- Prepare only those tax returns for which training was provided.
- Ensure no compensation of any kind is accepted for the services volunteers provide.
- Maintain strict confidentiality of taxpayer information.
- Ensure on-site quality review is performed on completed returns prior to taxpayer signature.
- Ensure a copy of the completed return is provided to the taxpayer.
- Follow CWF procedures.

Qualifications:

- No previous experience necessary!
- Requires a detail oriented, organized, efficient, individual who is able to multi-task in a fast-paced environment.
- Attend live training or utilize Link & Learn online training system (If returning volunteer, must re-certify for current tax year.) Live training will be conducted in January.
- Quality Reviewer volunteers must complete special Quality Review training and the pass the IRS Volunteer tax preparer certification exam at the Advanced level. Training will be conducted in January.
- Must be computer proficient and able to learn tax software. Willingness to work with the public, volunteers, stakeholders, partners in a helpful and supportive manner.
- Must be willing to assist all taxpayers within VITA/TCE scope.
- Friendly, dependable and flexible.

How to Apply: **Get Registered:** Please register at <http://cwfp Philly.volunteerhub.com> (or scan QR code). The Volunteer Hub portal will keep you up to date on the steps to becoming a volunteer Tax Preparer! Trainings will be posted on the site in late December.

