



Volunteer Tax Preparer

Roles:

A person who provides **free** tax preparation to taxpayers in the community, with a low to moderate income, individuals with limited English proficiency, persons with disabilities, and elderly individuals. To establish the greatest degree of public trust, Volunteers have a responsibility to provide high quality service and uphold the highest ethical standards.

Tasks:

- Attending basic and/or refresher tax law training and certification, including the use of electronic
- Filing software.
- Successfully passing a test on required tax law knowledge.
- Providing high-quality assistance to all customers.
- Directly preparing customer's return based on information provided by customers or answer related questions.
- Interviewing customer to determine if all income, deductions and allowable credits are claimed.
- Preparing only those tax returns for which training and certifications were provided.
- Preparing tax returns using electronic filing software (whenever possible).
- Referring customers with complex returns to the IRS website or help number, or to a tax practitioner or firm. However, volunteers should never refer customers to a specific practitioner or firm.
- Identifying all returns with site identification number (SIDN) assigned to your site.
- Ensuring that no compensation of any kind is accepted for the volunteer services provided.
- Maintaining confidentiality of customer information.
- Ensuring on-site quality review if performed on completed returns prior to being returned to customer.
- Providing State and Local Tax assistance (upon site coordinator's direction).
- Ensuring a copy of the completed tax return is provided to the taxpayer.
- Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin or disability.

Skills:

- Basic tax knowledge (Form 1040, Form 1040A, Form 1040EZ). Basic tax training and certification will be provided as needed.
- Willingness to share time, skills, and interests – e.g. volunteer a minimum of 2 to 4 hours per week for the Volunteer Tax Program from approximately Mid-January through Mid-April.
- Basic computer skills for inputting tax return information.
- Pride in performing tasks completely and accurately.
- Deal with the public in a helpful and supportive manner, including interview skills.
- Friendly, dependable and flexible.