



IN YOUR CORNER®

Volunteer Income Tax Assistance (VITA) Program: Tax Preparer Volunteer

Purpose:

The tax preparer volunteer will interview taxpayers using the IRS intake form and provide free tax return preparation services to eligible taxpayers.

Agency Contact:

- For more information or to apply contact Volunteer Services volunteer@camarin.org

Responsibilities and Duties:

- Provide quality tax return preparation services to taxpayers who qualify for assistance.
- Enter tax information into the appropriate software, obtain E-file authorization, and prepare taxes within certification level and within the scope of the VITA program.
- Adhere to IRS Quality Site Requirements, including maintaining taxpayer privacy and confidentiality standards, and code of conduct.
- Interview taxpayers virtually and/or in person and utilize available resources to assist taxpayers.
- Communicate with individuals in a respectful manner and responsive approach to different beliefs and practices, sexual orientations, disabilities, gender identities, ages, cultural preferences, language needs, and other state and federal and protected state statuses.
- Attend and obtain tax law certification and any additional IRS training certifications.
- Observe taxes being prepared before working directly with taxpayers.

Time Commitment:

- Online training program to be completed prior to January 2024.
- 4 hours/day each week from January to April 2024.

Required Skills and Qualifications:

Skills:

- Complete all IRS training requirements: Volunteer Standards of Conduct, Intake/Interview and Quality Review, the Volunteer Certification System, and the Tax Law Certification.
- Ability to engage with the public in a positive and productive way.
- Provide necessary support to the VITA team with dedication to the Agency's mission and vision.
- Strong written and verbal communication skills.
- Computer literate: Microsoft Office, IRS approved applications and software, and Windows operating systems.

Qualifications:

- Maintain and/or obtain tax law certification.
- Proficient in English; and proficiency in Spanish desired.
- Desire to develop and expand knowledge of tax preparation services.
- Adapt well to a dynamic, fast-paced environment and work effectively with a team.
- Tax experience not required.

Volunteer Benefits:

- Assist community members with filing income taxes and receiving tax credits and deductions where they meet qualifications.
- Assist Community Action Marin with their mission of "whole-family approach".
- Agency provides laptops.
- Free IRS Certified Training.
- Potential to obtain up to 14 credits of Continuing Education.
- Letters of reference (volunteers with long-term commitments).

Location:

- Community Action Marin Main Office: 555 Northgate Drive, San Rafael

Reasonable Accommodations:

This opportunity may involve physical demands (e.g., climbing stairs, carrying, lifting etc.) as these actions are essential to the role. Reasonable accommodations may be provided for individuals with disabilities to perform essential functions.