

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 contacts:

Ashley Creese, Volunteer Services – acreese@camarin.org

Laurel Hill, Director of Safety Net Services – lhill@camarin.org

Debbie Brown, VITA Site Coordinator – dbrown@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.
- Communicates with individuals in a respectful manner and responsive approach to differing beliefs and practices, sexual orientations, disability statuses, gender identities, ages, cultural preferences, linguistic needs, and other state and federal protected statuses.
- Attend and obtain Tax law certification and any additional IRS training certifications
- Observe taxes being prepared prior working directly with taxpayers

Time commitment:

2021 Dates – Fridays (9:00am – 12:30pm and/or 12:30pm – 4:00pm)

January 29th, February 5th, February 12th, February 19th, February 26th, March 5th, March 12th,
March 19th, March 26th, April 2nd, & April 9th

We partner with Canal Alliance to provide VITA services. Depending on your availability you may also volunteer with Canal Alliance on the dates below:

** 2021 Dates – Tuesdays (9:00am – 12:30pm and/or 12:30pm – 4:00pm) **

February 2nd, February 9th, February 16th, February 23rd, March 2nd, March 9th, March 16th, March 23rd, March 30th, April 6th, & April 13th

Required skills and qualifications:

Skills

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

Qualifications

- Maintain and/or obtain Advanced Tax Law certification
- Proficient in English; and proficiency in Spanish desired
- Desire to develop and expand knowledge of tax preparation services
- Adapts well to a dynamic, rapidly changing environment and works effectively within a team
- Prior tax experience not required

Benefits to volunteer:

- Helping fellow community members with filing income taxes and receive tax credits and deductions which they are entitled to
- Assisting Community Action Marin in aligning to the Agency's whole-family approach
- Free IRS-certified training
- Potential to earn up to 14 Continuing Education credits
- Letters of reference (long-term volunteer commitments)

Location:

- Community Action Marin Main Office – 555 Northgate Drive, Suite 201, San Rafael, CA 94903
- Virtual opportunities available

Reasonable Accommodations:

This opportunity may involve physical demands (e.g. climb stairs, carrying, lifting, etc.) as the actions are essential function to the role. Reasonable accommodations may be made to enable individuals with qualifying disabilities to perform essential functions.