



VITA Tax Preparer Volunteer
Spring 2020

Every year, the *Campaign for Working Families, Inc.* recruits, trains, and manages hundreds of volunteers and interns who staff free tax sites across Philadelphia and surrounding counties, as well as South Jersey. In 2019, CWF's Philadelphia and South Jersey tax sites provided over 48,000 taxpayers with access to important tax credits through free tax preparation, resource building and asset development services. Since our founding, we have brought in over \$441 million in refunds to our region's economy.

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

Reports to: Volunteer & Special Projects Manager

Time Commitment: Seasonal, Part-Time. January to April 15, 2020; 24 hour minimum commitment. Training opportunities begin in November and run through January

Training: Candidates must be available to attend required training(s) or self-certify

Locations: Philadelphia; Delaware & Montgomery Counties, PA; South Jersey

Responsibilities:

- Certify at IRS Basic or Advanced tax preparation level (either via self-certification or our free trainings)
- Interview taxpayer to determine if all income, deductions and allowable credits are claimed
- Prepare only those tax returns for which training was provided
- Ensure no compensation of any kind is accepted for the services rendered
- Maintain strict confidentiality of taxpayer information and documentation
- Ensure a copy of the completed return is provided to the taxpayer
- Follow CWF procedures and guidelines as instructed at training and tax site locations

Qualifications:

- **No previous experience necessary!**
- Requires a detail oriented, organized, efficient, individual who is able to multi-task in a fast-paced environment
- Attend training or utilize IRS' Link & Learn (www.linklearncertification.com) online training system. If returning volunteer, must re-certify for current tax year
- Quality Reviewer volunteers must pass the IRS volunteer tax preparer certification exam at the Advanced level
- Must be computer proficient and able to efficiently utilize tax software. Willingness to work with the public, volunteers, stakeholders, partners in a helpful and supportive manner.
- Friendly, dependable and flexible

How to Apply: Send email to Volunteer Manager, Jonathan Barnes, at jbarnes@cwfp Philly.org and register on our portal <https://cwfp Philly.org/volunteerhub.com>