

Individual Tax Preparer – Position Description

The individual tax preparer works one-on-one with Tri-CAP customers to prepare state and federal tax returns. By doing this they help the customer access important tax credits like the Earned Income Tax Credit (EITC). Preparers also serve as a trusted (and free) resource, ensuring customers file correctly. To apply, please sign up via our website, www.tricap.org. You may also contact the Tax Program Manager, at tricaptaxes@tricap.org or 320-251-1612.

Role and responsibilities:

- Prepare state and federal tax returns using tax software called Tax Wise
- Direct appropriate customers to on-site financial services
- Work cooperatively with staff and other volunteers to provide high-quality service to customers
- Maintain strict confidentiality, providing as much privacy as logistically possible

Skills required:

- Meet one of the following criteria:
 - Experience filing your own tax return
 - Taken a tax law or tax accounting course at the college level
 - Work in the accounting field
- Ability to discuss customer's tax and financial situation with empathy and respect
- Computer proficient
- Enjoy working in a diverse ethnic and socio-economic environment

Commitment and timeline:

January – April 15

- Training on Tax Law - federal and state- January 8 to 10 hours
- Software training 4 to 12 hours
- Prepare tax returns – End of January – April Volunteer at least once a week for 4 hours

Locations:

Tri-CAP currently operates sites in our service area of Stearns, Benton and Sherburne counties. Volunteers select a site that is convenient to work at and best works with their schedule.