



Helping People. Changing Lives.

Financial Stability Assistant	Family Resources
Reports To Tax Site Coordinator	Approved Date

Overview:
The Financial Stability Assistant (FSA) provides financial stability support for taxpayers receiving services from Tri-CAP. Working closely with the Tax Site Coordinator, the FSA meets with each taxpayer to assess the financial stability needs of the taxpayer and provide information and resources as requested by the taxpayer. The FSA also assists the taxpayers in opening savings, checking, myRA, or pre-paid card accounts.
Service Impact:
<ul style="list-style-type: none"> • Tri-CAP Volunteer Income Tax Program (VITA) serves individuals grossing < \$35,000 and families < \$55,000 per year. • Classroom and online training is provided to Volunteers. • Returns are efiled for quick receipt of refunds. • We offer free walk in preparation services from the end of January through tax day (mid April) at locations in St. Cloud, Cold Spring, Foley, Waite Park, and Elk River. • Appointments are scheduled at the Tri-CAP office May through August for federal, state, and property tax/renters rebates. • Referrals are also provided for basic needs services and financial education and financial stability opportunities.

Key Responsibilities:

- Meet with each tax customer to assess their interest in financial information or resources.
- Assist taxpayers to open savings, checking, myRA, or CFR pre-paid card accounts.
- Answer customer questions regarding financial topics and resources.
- Assist in the overall operation and flow of the tax clinic, filling in at the front table as needed.
- Provide a “Tri-CAP friendly face” for customers

Time Commitment:

January – April

- Tax Volunteer Training Day (a Saturday in January) 4 hours
- Online training 1 to 2 hours
- End of January – April Volunteer at least once a week for 4 hours

Qualifications:

- Passion for connecting with people
- Strong leadership skills and ability to work independently
- Ability to relay complex information in a clear and direct manner
- Ability to multi task in a sometimes chaotic environment
- Enjoy working in a diverse ethnic and socio-economic environment



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Physical Demands:

- A combination of periods of sitting or standing.
- Able to lift or carry boxes/tubs of supplies up to 20 lbs.

Work Environment:

- Low to moderate noise levels.
- No extreme temperatures.

Locations: St. Cloud, Elk River, Cold Spring, Foley, and Waite Park

Benefits to Volunteering
<ul style="list-style-type: none">• Gratifying volunteer work that allows you to develop new skills and gain valuable experience, working with diverse customers, volunteers and staff.• Improve your community by helping hardworking families increase their income, thus their livelihood.• Build your resume; an excellent opportunity for students and jobseekers to demonstrate experience to employers.

This description describes the general nature and work expected of an individual assigned to this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability

Volunteer Acknowledgement Date

Supervisor Signature Date