



# Helping People. Changing Lives.

Individual Tax Preparer	Family Resources
Reports To	Approved Date

<b>Overview:</b>
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.
<b>Service Impact:</b>
<ul style="list-style-type: none"> <li>• Tri-CAP Volunteer Income Tax Program serves individuals grossing &lt; \$35,000 and families &lt; \$55,000</li> <li>• Classroom and online training is provided to Volunteers who become IRS Certified to provide free preparation services at our tax sites.</li> <li>• Returns are efiled for quick receipt of refunds.</li> <li>• We offer free walk in preparation services from the end of January through tax day (mid April) at locations in St. Cloud, Cold Spring, Waite Park, and Elk River.</li> <li>• Appointments are scheduled at the Tri-CAP office May through august for federal, state, and property tax/renters rebates.</li> <li>• Referrals are also provided for basic needs services and financial education and financial stability opportunities.</li> </ul>

**Key Responsibilities:**

- Prepare state and federal tax returns using TaxSlayer software.
- 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

**Time Commitment:**

January – April

- Classroom training on Tax Law - federal and state, VITA Program information, etc.- January 8 to 10 hours
- Online software training 4 to 12 hours using videos, practice lab, and completing certification exams.
- Prepare tax returns – End of January – April, and May-August if interested.
- Volunteer at least once a week for 4 hours



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**Qualifications:**

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 or financial 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

**Physical Demands:**

- A combination of periods of standing and sitting, mostly sitting.
- 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"> <li>• Gratifying volunteer work that allows you to develop new skills and gain valuable experience, working with diverse customers, volunteers and staff.</li> <li>• Improve your community by helping hardworking families increase their income, thus their livelihood.</li> <li>• Build your resume; an excellent opportunity for students and jobseekers to demonstrate experience to employers.</li> </ul>

*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*

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Volunteer Acknowledgement

Date

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Supervisor Signature

Date