Tax Preparer Volunteer

codeforamerica.org/taxvolunteers

The Program
To close the tax benefit participation gap, Code for America is conducting a series of pilot studies to gain valuable insight into the barriers individuals with low or no income face when trying to access tax benefits. Pilots will range from testing different methodologies around collecting taxpayer information to discovering potential barriers around different expedited filing models to exploring techniques for supporting taxpayers using various do-it-yourself tax filing programs.

Role
Tax Preparer volunteers will prepare returns in tax preparation software using information and documentation provided by the taxpayer. Volunteers will apply their advanced tax knowledge to ensure taxpayers receive all tax credits for which they are eligible. Training will be provided to ensure each volunteer has a strong understanding of applicable tax law, is able to obtain Advanced IRS certification, and has a clear understanding of the purpose of the assigned pilot.

Duties and responsibilities may expand based upon individual strengths and schedule availability.

Requirements
- Complete 12 hours of tax orientation and training (virtual)
- Obtain IRS Advanced certification
- Work closely with staff and volunteers
- Strong written communication skills
- Superb customer service skills
- Extensive experience using online software
- Excellent data entry and general computer skills
- Assist with complementary tasks as needed

Bonus! Do you have other skills that we should know about? Here are a few things we think are great:
- Experience working remotely
- Training on Diversity, Equity, and Inclusion (DEI)
- Experience conducting community research
- Bilingual

To apply, please sign up for a virtual Info Session.

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