

VITA Volunteer Tax Preparer

La Casa de Esperanza
Volunteer Description

Roles:

Provide free basic tax return preparation for eligible taxpayers. To establish the greatest degree of public trust, volunteers have a responsibility to provide free high quality service and uphold the highest of ethical standards.

Tasks:

- Attend new and/or refresher tax law training and certification as needed, including the use of electronic filing software. Training is free to all volunteers and provided by La Casa de Esperanza.
- Successfully pass a test on required tax law knowledge.
- Provide high-quality assistance to all taxpayers. Directly prepare taxpayer's return based on information provided by taxpayer or answer tax related questions.
- Interview customer to assure that all income, deductions and allowable credits are claimed.
- Prepare only those tax returns for which training and certification were provided.
- Prepare tax returns using electronic filing software.
- Refer customers with complex returns to the IRS web site help number, or to a tax practitioner.
- Ensure on-site quality review is preformed on completed returns prior to being returned to customer.
- Ensure a copy of the completed return is provided to the taxpayer.
- Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin, or disability.
- Maintain confidentiality of customer information.

Skills:

- Basic tax knowledge (Form 1040, Form 1040A, and Form1040EZ). Basic tax training and certification will be provided to all VITA Volunteers.
- Basic computer skills for inputting tax return information.
- Ability to interview clients thoroughly to prepare return as accurately as possible.
- Pride in performing tasks completely and accurately.
- Deal with the public in a helpful and supportive manner.
- Friendly, dependable and flexible.
- Willingness to share time, skills, and interests-e.g., volunteer a minimum of 2 to 4 hours per week for the Volunteer Tax Program from approximately Mid-January through April 15.

To Apply:

- Complete volunteer application form and submit to Elizabeth Torres, VITA Program Manager at etorres@lacasadeesperanza.org or mail to Elizabeth Torres, La Casa de Esperanza, 410 Arcadian Avenue, Waukesha, WI 53186. For more information, please contact Elizabeth Torres at 262-547-0887.