



Make Tax Time Pay!

Claim ALL the Tax Credits You Earned!

Volunteer Description – Volunteer Tax Expert

Program:

“It’s Money in Your Pocket” is a county-wide effort to offer free tax help to low and moderate income residents of Butler County. **Our goal is simple: to ensure that people file their taxes, take advantage of all the credits for which they are eligible and do not pay outrageous filing fees to commercial tax preparers.** The tax preparation sites will be located throughout the county. Volunteer Tax Preparers who have been trained by the IRS will prepare tax returns and file them electronically, so the filer can expect a quick refund. We will also offer banking services so filers who do not have a bank account can open an account and choose to have their returns deposited directly into their account.

Purpose of Position:

Provide support to Volunteer Tax Preparers and prepare tax returns that are beyond the training of the Volunteer Tax Preparers.

Length of Appointment:

January - April

Responsibilities:

- Complete both the basic and advanced training sections on tax law on the Link and Learn program at www.irs.gov (you can test out of both).
- Successfully pass tests on required tax law knowledge on the Link and Learn program at www.irs.gov.
- Complete the required training session on the use of the tax preparation software, Tax Wise.
- Provide high-quality assistance to all taxpayers. Directly prepare taxpayer’s return based on information provided by taxpayer or answer tax related questions. Interview taxpayer to determine if all income, deductions and allowable credits are claimed.
- Prepare tax returns that require tax knowledge that is beyond what is taught to Volunteer Tax Preparers.

- Assist Volunteer Tax Preparers when needed.
- Prepare tax returns using electronic filing software.
- Identify all returns with the Site Identification Number assigned to your site.
- Ensure no compensation of any kind is accepted for the volunteer services provided.
- Maintain confidentiality of taxpayer information.
- Ensure on-site quality review is performed on completed returns prior to being returned to taxpayer.
- Ensure a copy of the completed return is provided to the taxpayer.

Qualifications:

- Advanced tax knowledge.
- Willingness to share knowledge and skills to assist/supervise Volunteer Tax Preparers.
- Basic computer skills for inputting tax return information.
- Deal with the public in a helpful and supportive manner, including interviewing skills.
- Friendly, dependable and flexible.

Support Available:

- Tax information available from the IRS.
- Technical support will also be available from the Internal Revenue Service.

Time Required:

Training: Each volunteer must complete both the basic and advanced tax law sections on the on the Link and Learn program at www.irs.gov. This can be done as soon as the IRS installs the new training materials for the 2005 tax filing season (hopefully by 11/1/05). Volunteers should complete this training and the required tests at the end of each section on their own (volunteers with previous tax experience can test out of the sections.) The IRS will present classroom training on the use of Tax Wise tax preparation software on a number of different dates in January (dates TBA). This training will be from 4-5 hours long.

Tax Preparation: We request that each Volunteer Tax Expert work at least 4 sessions throughout tax season. Depending on your site, this may be an evening session, a Saturday session (usually 4 hours), or a slot of appointments.