



Make Tax Time Pay!

Claim ALL the Tax Credits You Earned!

TAX EXPERT - Volunteer Description

“It’s Money in Your Pocket” offers free tax preparation to low and moderate income residents of Butler County. **Our goal is to ensure that people file their taxes, take advantage of all the credits for which they are eligible, avoid paying high fees to commercial tax preparers, and receive all the money due to them by avoiding the high interest rates of Refund Anticipation Loans.** The tax preparation sites will be located throughout the county. Volunteer Tax Preparers, trained and certified by the IRS, will prepare tax returns at no cost 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:

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

Commitment:

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

Responsibilities:

- Provide high-quality assistance to all taxpayers. Prepare taxpayer’s return using electronic filing software 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 Tax Preparers and assist Tax Preparers when needed.

Qualifications:

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

Training:

- Must complete the Basic, Intermediate and Advanced tax law modules on the Link and Learn program at www.irs.gov. Volunteers must complete this training and the required tests at the end of each section (volunteers with previous tax experience can test out of each section.) In addition, you must attend a Process-Based Training that is designed to provide the tools needed to prepare accurate tax returns.

* *Trainings will be held evenings/weekends in Butler and Hamilton Counties.*

If you're interested in volunteering or to receive additional information, please contact:

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