



YOUR FINANCIAL WELLNESS CENTER
CAMPAIGN FOR WORKING FAMILIES
www.cwfphilly.org

Tax Preparer Volunteer

Spring 2022

Every year, the [Campaign for Working Families, Inc.](#) recruits, trains, and manages hundreds of volunteers and interns who staff free tax sites across Southeastern PA and South Jersey. In response to the COVID pandemic, CWF's services expanded to include a virtual tax prep program which has enabled us to serve taxpayers safely and ensure they have access to important tax credits through free tax preparation, resource building and asset development services. For this upcoming tax season, CWF is seeking highly motivated and tech-savvy individuals to fill our multiple volunteer Tax Preparer positions, both for our **virtual and in-person** tax prep programs.

Purpose of Position: As a volunteer Tax Preparer, you will assist working families in preparing their Federal and State tax return utilizing online tax preparation software. Tax Preparers are trained to accurately apply tax law and identify any tax benefits for which taxpayers qualify

Reports to: *Director of Volunteer Engagement*

Time Commitment: 30-hour minimum shift commitment (excludes training time), January to April 15, 2022.

Training: Free training opportunities begin in November and run through January. Candidates must be available to attend required virtual training(s) or self-certify

Locations: *In-person:* Philadelphia and South Jersey
Virtual: Online

Responsibilities:

- Certify at IRS Basic or Advanced tax preparation level (either via self-certification or our free trainings)
- Interview taxpayer to determine if all income, deductions and allowable credits are claimed
- Prepare only those tax returns for which you are IRS certified
- Ensure no compensation of any kind is accepted for the services rendered
- Maintain strict confidentiality of taxpayer information and documentation

Qualifications:

- **No previous experience necessary!**
- Requires a detail oriented and organized individual who is able to multitask in a fast-paced environment
- Attend our training or utilize IRS' *Link & Learn* online training system. If returning volunteer, must recertify for current tax year
- Quality Reviewer volunteers must certify at the Advanced level and complete applicable online training
- Must be computer proficient and able to efficiently utilize tax software. Willingness to work with the public, volunteers, stakeholders, partners in a helpful and supportive manner.
- Friendly, dependable and flexible

How to Apply: Send email to *Director of Volunteer Engagement*, Jonathan Barnes, at jbarnes@cwfp Philly.org