



## **Tax-Aid Volunteer Opportunities**

Tax-Aid has been helping San Francisco Bay Area families and individuals with low income to prepare their income tax returns for 30 years. We offer our free service in the community through the efforts of hundreds of accountants, lawyers, accounting students and other professionals who volunteer their time.

We are seeking volunteers of all levels to help us. There are volunteer opportunities for Greeters, Interviewers, Tax Preparers, Translators, Check-out Assemblers, Tax Return Reviewers and Tax Experts. While some opportunities require knowledge of tax laws, there are many volunteer opportunities for those who are not tax experts.

### **Tax-Aid Volunteer Responsibilities for All Positions**

- Commit to a minimum of three volunteer sessions (an average session lasts about 5 hours) during the tax season (January-April). Most tax sites are open on Saturdays.
- Complete online training (available for on demand viewing, length of training depends on volunteer position)
- Work with individuals in a positive, patient and respectful manner

### **Preferred Skills, Experience, Attitude and Availability**

- Bilingual skills desirable (English/Spanish, English/Cantonese, English/Mandarin, English/Russian, English/Tagalog and English/Vietnamese)
- Strong interpersonal communication skills
- Tax background desirable, but not required
- Experience working with people with low income desirable
- Enthusiastic and flexible
- Availability Saturdays or weekday evenings

### **Volunteer Positions**

#### ***Greeters/ Hosts***

- Greet Taxpayers
- Make sure they are comfortable while they wait
- Check that they have the necessary tax documents so they can be helped
- Inform Taxpayer of wait time



### ***Interviewer***

- Interview Taxpayers
- Help Taxpayers complete tax intake forms

### ***Tax Preparers***

- Familiar with Lacerte's tax preparation software
- Tax background preferred but can learn via training/shadowing experienced volunteer
- Interview Taxpayers
- Complete tax forms
- Prepare the return for filing

### ***Translators***

- Must be bilingual or multilingual
- Help to interview Taxpayer
- Facilitate communication between the Taxpayer and Tax Preparer
- Desired language skills are English/Spanish, English/Cantonese, English/Mandarin, English/Russian, English/Tagalog and English/Vietnamese preferably both verbal and written

### ***Printer***

- Prints client tax returns
- Must have working knowledge of HP printers and troubleshooting skills
- Basic knowledge of the Lacerte's tax program required

### ***Checkout / Assembler***

- Assembles the client return
- Explains e-filing/ mailing procedure to Taxpayer
- Obtains signatures to complete paperwork for return/e-filing

### ***Tax Return Reviewers***

- Review returns that have already been prepared
- Must have tax background or be a tax professional

### ***Tax Expert***

- On site to answer any complex tax questions



## **Volunteer Benefits**

- Learn tax law and utilize industry standard tax software
- Meet and network with accounting, tax, legal and other professionals
- Help make a substantial difference in the lives of clients
- Make new friends

## **How to Apply:**

Register online at [www.tax-aid.org](http://www.tax-aid.org). For questions or more information email: [admin@tax-aid.org](mailto:admin@tax-aid.org).

**Not able to volunteer during the tax season?** No problem! Ask us about our newest program, Tax-Aid 365.