

VOLUNTEERING PROMISES BIG RETURNS

OPPORTUNITIES FOR EVERYONE!

Find the role that best fits your skills and interests:

Typically volunteers commit 3-4 hours each week during the tax season

Tax Preparer

Work one-on-one with customers using intake forms and computer software to electronically file high quality tax returns and help working families receive all tax refunds and credits for which they are eligible

Skills Needed: No tax law experience necessary. Basic computer literacy, attention to detail, customer service skills.

Training:

- New Volunteers: 8-10 hours
- Returning Volunteers: 4-6 hours

Asset Building Coach

Help customers create wealth by connecting them to affordable banking and savings products. Coaches will engage customers in the waiting room introducing financial products and promoting savings to customers in both group and one-on-one settings

Skills Needed: Excellent communication skills, computer literacy, outgoing and high energy personality and comfort speaking in front of small groups. Sales experience helpful but not mandatory

Training: 6-8 hours

Advanced Tax Preparer

In addition to the responsibilities of a tax preparer, complete more difficult returns and assist less-experienced volunteers.

With additional training you can assist with the Quality Review Process to ensure that every tax return is completed in full and free of errors.

Skills Needed: Seasoned volunteers, lawyers and tax professionals are perfect candidates for this position.

Training: 4-6 hours (with the option of an additional 2 hour Quality review Training)

Greeter or Screener

A strong greeter is essential to creating a welcoming atmosphere at the site. Greet customers and guide them through the intake process, screening for eligibility, and compiling all intake document. Talk to customers about saving money and sign them up for essential financial products.

Skills Needed: Customer Service skills and a high level of organization. Computer skills not necessary

Training: 3 hours



TO SIGN UP:
CALL OR EMAIL Karen Do
@409-729-4040 or dokaren@sbcglobal.net

United Way of Mid & South Jefferson County