



Campaign For Working Families, Inc.

JOB DESCRIPTION

EMPLOYEE INFORMATION

Job Title:	Experienced Tax Preparer	Last Updated:	November 2023
Department:	Tax Operations	Primary Manager:	Tax Operations Area Manager
DOL Status:	Part-time -Seasonal	FLSA Exemption:	Exempt

Overview Campaign For Working Families

Campaign For Working Families Inc., mission is to champion the financial well-being and economic mobility of individuals and families by leading programming and advocating for policies, initiatives, and support systems that ensure equitable opportunities and financial stability. CWF is driven by the belief that every individual and family deserve respect, dignity, and the tools/information to succeed, and CWF is committed to enacting positive change at both the policy and grassroots levels by fostering a culture of empathy, data-driven decision-making, and collective action. The following core values serve as a guiding framework for the Campaign for Working Families, helping to define its mission, goals, and actions in support of individuals and families throughout its communities:

- Equity and Inclusion:** We believe in a society where all individuals and families, regardless of their background, race, gender, or socioeconomic status, have equal opportunities and access to resources.
- Family-Centered Approach:** We prioritize policies and initiatives to support the well-being, stability, and growth of families, recognizing that strong families are the foundation of a thriving society.
- Collaboration and Partnerships:** We value collaboration with other organizations, governments, businesses, and individuals who share our commitment to the well-being of working families.
- Data-Driven Decision-Making:** We rely on evidence and data to inform our policies and initiatives, ensuring that our efforts are effective and impactful.
- Respect and Dignity:** We treat all individuals with respect and dignity, recognizing the inherent worth of every member of a working family, and striving for a society that upholds these values.

Position Summary

The Tax Preparer at Campaign for Working Families (CWF) will provide tax assistance to individuals and families, and support clients in navigating the complexities of Federal and State tax systems. The Tax Preparer will be tasked with the preparation of accurate tax returns, while upholding the confidentiality and trust of the clients served. The Tax Preparer will possess a keen eye for detail and a solid understanding of tax-related issues to maintain the integrity of the tax preparation process, while delivering quality customer service. Key aspects of the role include conducting thorough interviews to accurately capture taxpayer information, reviewing financial documents, and translating complex tax law into actionable data entry that supports the filing of a complete and accurate tax return. The Tax Preparer plays a significant role in advancing the financial well-being of the communities served by CWF.

Role and Responsibilities

Tax Preparation:

- Analyze financial information and prepare both Federal and State income tax returns using designated online tax preparation software.
- Apply knowledge of current tax regulations to maximize deductions, credits, and other tax benefits for clients, ensuring lawful reduction of tax liability.
- Review prior-year tax returns as needed for possible carry-forward credits or deductions that may benefit the current year's tax situation.
- Coordinate with clients to collect all necessary documents, such as W-2s, 1099s, and other relevant forms required for a complete tax return.

Data Entry:

- Execute thorough review and entry of taxpayer information into tax software, ensuring every detail is captured accurately.
- Confirm the authenticity and accuracy of the information provided by clients through cross-referencing supporting documentation and direct client engagement.
- Utilize tax software to input data in a manner that supports effective electronic filing and ease of access for future amendments or audits.
- Maintain an organized system for tracking the progress of tax return preparations and submissions, adhering to a schedule that meets filing deadlines.

Customer Service:

- Conduct taxpayer interviews to gather complete financial data, ensure understanding of available deductions and credits, and address any taxpayer concerns.
- Educate clients as needed on tax-related issues and the tax preparation process to enhance their understanding and to facilitate smoother future engagements.
- Create a welcoming environment that encourages clients to share necessary information and ask questions regarding their tax situation.
- As needed and required, follow up with clients to verify information, resolve discrepancies, and provide updates on the status of their tax return preparation and submission.

Compliance:

- Uphold the highest standards of confidentiality, ensuring all taxpayer information is securely handled and stored in accordance with the organization's privacy policies and legal requirements.
- Remain aware of breaches of information, implementing and following security protocols to protect sensitive taxpayer data.
- Attend training and stay current with the Internal Revenue Service (IRS) regulations and organizational policies to guarantee compliance in all areas of tax preparation.
- Prepare and maintain comprehensive and accurate documentation for each tax return to provide a reliable audit trail and to facilitate quality control reviews.

Qualifications (Education and Experience)

- High School diploma or an equivalent educational certificate is required.
- Understanding of tax law, with the ability to apply this knowledge practically in the preparation of Federal and State tax returns.
- A minimum of two years of professional experience in tax preparation, taxation and/or financials services inclusive tax support/service(s).
- Prior experience in tax preparation and/or financial services is mandatory, demonstrating a history of managing tax-related responsibilities.
- The candidate must be detail-oriented with a capacity to handle confidential and sensitive information with the utmost discretion.
- Proficient data entry skills are desirable, indicating the ability to input information accurately and efficiently into tax preparation software (TaxSlayer).:
- The ability to work independently with minimal supervision, as well as collaboratively as part of a diverse team, is crucial.
- Bilingual abilities, particularly in Spanish, Mandarin, or other languages.

Other Specialties, Certifications, Physical Requirements, and Work Conditions

- Regular, predictable and punctual attendance is required.
- This position operates in an office setting or works from home and routinely uses standard office equipment such as computers, phones, photocopiers, scanners, filing cabinets and fax machines.
- Exertion of physical strength to lift, carry, push, pull, or otherwise move objects up to 10 pounds. Work involves sitting, walking, and standing is often necessary in carrying out job duties.
- Ability to learn new things and master new concept(s).
- Comfortable in a chaotic and ever-changing environment
- Attention to detail.
- Commitment to the Campaign for Working Families Mission

Acknowledgment

I acknowledge that I have read and accepted this job description. I understand what is expected of me in this position, and I can perform the essential functions as outlined with or without reasonable accommodation. Furthermore, I understand the duties and responsibilities listed in this job are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position. If I have any questions about duties and responsibilities not specified in this job description that I am asked to perform, I should discuss them with my immediate supervisor or Human Resource representative.

Employee Name (Please Print)

Employee Signature

Date