



## Campaign For Working Families, Inc. Job Description

<b>Position Title:</b>	Volunteer Tax Preparer	<b>Last Updated:</b>	November 2023
<b>Department:</b>	Tax Operations & Volunteers	<b>Volunteer Timeline:</b>	January through April 2024
<b>Manager:</b>	Tax Operations Area Manager & Director of Volunteer Engagement & Partnerships	<b>Schedule:</b>	Flexible

### 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:

1. **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.
2. **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.
3. **Collaboration and Partnerships:** We value collaboration with other organizations, governments, businesses, and individuals who share our commitment to the well-being of working families.
4. **Data-Driven Decision-Making:** We rely on evidence and data to inform our policies and initiatives, ensuring that our efforts are effective and impactful.
5. **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 Volunteer 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 Volunteer Tax Preparer will be tasked with the preparation of accurate tax returns, while upholding the confidentiality and trust of the clients served. The Volunteer 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 Volunteer 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

- Ability to obtain IRS volunteer tax certification at the Basic or higher level (either via self-certification or our free in-person or virtual trainings)
- **Willingness to volunteer 30 total hours** throughout the tax season (excludes training time) January through April 2024
- 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.

- Commitment to the Campaign for Working Families Mission.

### **Application Instructions**

[Click here](#) to visit our website to sign up and learn more about volunteering.