

Tax Preparer Description

Our VITA (Volunteer Income Tax Assistance) Program provides free tax preparation to low/middle-income individuals and families, allowing them to receive the maximum refund possible, to meet their own pressing basic needs or save for the future, without being subject to costly fees or predatory refund-anticipation loans.



United Way
of Washtenaw County

To apply, visit uwgive.org/volunteerforvita and complete our brief Volunteer Interest Form. Contact our VITA Team with questions at vita@uwwashtenaw.org.

Benefits of Volunteering

- Help participants with this vital service, at no charge to them
- Engage in gratifying volunteer work – interact directly with the people you are helping and see the immediate impact of your work
- Develop/refine new or existing skills; gain valuable experience in preparing income tax returns and encountering various tax issues
- Develop/refine client counseling skills in a protected environment - help always available
- Networking/resume building opportunity

Duties

- Provide top-notch customer service with empathy and compassion
- Complete all required training & certification exams
- Review intake sheet/tax documents with participants & prepare tax returns using our software
- Complete the close out process for finished returns
- Communicate with participants about their tax return, answer questions, and arrange for client to bring in additional information, if necessary

Training & Time Commitment

- Attendance at **four** 3-hour training sessions required for new volunteers. (Various dates in Dec & Jan, registration required): **VITA 101, Federal Tax Training, Michigan Tax Training 1 & 2**
- Approximately 4-12 hours of self-study and exam completion required in Dec or Jan
- Minimum of **ten** 3.5 shifts between the first week of February through early April
- Hours: Shifts are available one weekday 12:45pm-4pm, 3:45pm-7pm, Saturdays 9:45am-1pm and 12:45-4pm

Qualifications/Requirements

- Ability to have empathy for others and provide top-notch customer service
- Attend required in-person training & pass IRS Ethics & Advanced certification tests
- Willingness to work through more complex tax situations with support
- Ability to accurately follow written instructions
- Competency with the use of computers and printers
- Some experience in preparing individual income tax returns or taxation course is useful but not required
- Must be 18 or older