



VITA Tax Preparer

Position Overview: The VITA Tax Preparer provides free, high-quality tax preparation services to individuals and families in need, helping them maximize their refunds and access valuable credits. As a VITA Tax Preparer, you will play an essential role in supporting financial stability within your community. Trident United Way provides all necessary training and materials, so no prior experience is required.

Responsibilities:

- **Tax Preparation:** Prepare tax returns for low-to-moderate-income clients using IRS-approved software, adhering to all guidelines and quality standards.
- **Client Interviews:** Conduct thorough intake interviews to gather relevant information and assess clients' tax preparation needs.
- **Quality Review:** Perform a final review of tax returns, ensuring accuracy and compliance with IRS standards before submission.
- **Client Education:** Explain tax return results to clients, answer basic questions and advise on available credits and refunds.
- **Compliance and Confidentiality:** Maintain strict confidentiality of client information and uphold IRS quality standards.

Certification Requirements: All VITA Tax Preparers must pass IRS certification tests, including:

- **Volunteer Standard of Conduct (VSOC)**
- **Intake/Interview & Quality Review**
- **Basic and/or Advanced IRS Certification** (depending on the level of tax returns prepared)

Trident United Way will offer free material and training sessions in January to prepare you for certification. Online self-study training is also available starting in December.

Qualifications:

- Attention to detail and comfort working with numbers.
- Good interpersonal and communication skills, with the ability to work effectively with diverse populations.
- Ability to follow procedures and uphold confidentiality standards.
- Basic computer skills; familiarity with tax software is a plus.



- Prior tax preparation experience is helpful but not required.

Commitment: VITA Tax Preparers are encouraged to volunteer for one or more shifts per week during the tax season (January through April). Shifts are generally 5-6 hours each.

Benefits of Volunteering as a VITA Tax Preparer:

- Gain hands-on experience in tax preparation and financial services.
- Receive IRS certification and valuable training in tax preparation.
- Make a meaningful difference by helping community members access vital financial resources.
- Collaborate with a team of dedicated, supportive volunteers.

Join Today! Join our team as a VITA Tax Preparer and help community members access critical tax assistance. No prior experience necessary—just bring your dedication and willingness to learn!