



Volunteer Tax Preparer

ROLE SUMMARY

Prepare federal and state tax returns for Volunteer Income Tax Assistance (VITA) clients using tax software. No prior tax experience needed.

ROLE DESCRIPTION

- Provide high-quality tax return preparation to VITA clients and uphold the highest ethical standards while preparing tax returns.
- Only prepare tax returns that are within the volunteer's certification level(s) and within the scope of the VITA program.
- Interview clients using Form 13614-C, Intake/Interview and Quality Review Sheet, to determine if all income, deductions, and allowable credits are claimed.
- Engage clients when preparing their tax return, to ensure understanding of their intake information and advise clients that they are responsible for the information on their tax return.
- Refer clients with tax returns out of the scope of the VITA program to explore Free File options or use a professional tax return preparer.
- Engage with other volunteers, staff, partners, and clients in a helpful and supportive manner.
- Maintain confidentiality of client information.

TRAINING REQUIREMENTS

- New volunteer tax preparers must complete
 - The Volunteer Standards of Conduct (VSC) Training – Ethics
 - Publication 5101, VITA/TCE Intake/Interview and Quality Review Training.
- Returning volunteer screeners are encouraged to review the VSC Training
- All volunteers who answer tax law questions or assign, prepare, and quality review tax returns must complete
 - The VSC certification
 - Intake/Interview and Quality Review certification
- Certification at the Basic level is the minimum requirement
- For more complicated tax returns, certification at the Circular 230, Advanced, Military, Puerto Rico levels, Foreign Student, or international tax law levels is required