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## **INCOME TAX ASSISTANCE (VITA) VOLUNTEER**

*Our Mission: Recognizing the special vulnerability of children, the mission of the Human Response Network is to better the lives of all people in Trinity County through advocacy, education, and programs that promote personal empowerment, peaceful co-existence, mutual respect, and access to needed services.*

### **DESCRIPTION OF DUTIES**

#### **Duties:**

- Meet individually with clients, interview clients, review tax documents, and prepare returns using professional tax software
- Connect clients to meaningful savings opportunities including U.S. Savings Bonds and credit union accounts

#### **Qualifications:**

- Must successfully complete free tax preparation training & pass IRS certification test
- Must maintain client confidentiality
- Ability to build rapport & discuss sensitive financial information with care
- No prior tax experience is required, but an ability to prepare a basic tax return or other relevant classroom or work experience in tax law or accounting is recommended

#### **Time Requirement:**

- A minimum of one 4-6 hour shift, one weekday per week during tax season (January 30<sup>th</sup> to April 18<sup>th</sup>)
- Our greatest need is during February and early March, when our tax site is the busiest

#### **Training:**

- Tax Volunteers are required to attend a pre-season orientation and complete the training
- Training is online through IRS's Link and Learn system, which can be done at HRN with one-on-one mentoring and assistance
- Both *new* and *returning* Tax Volunteers must pass the IRS certification exam

#### **Benefits:**

- Gain professional skills while helping families in Trinity County boost their financial stability!
- Free tax law and tax preparation training, culminating in IRS certification
- Support from trained Vita Volunteers and staff with 12+ years' experience

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