



Tax-Aid Volunteer Opportunities

Tax-Aid has been helping San Francisco Bay Area families and individuals with low income to prepare their income tax returns for 30 years. We offer our free service in the community through the efforts of hundreds of accountants, lawyers, accounting students and other professionals who volunteer their time.

We are seeking volunteers of all levels to help us. There are volunteer opportunities for Greeters, Interviewers, Tax Preparers, Translators, Check-out Assemblers, Tax Return Reviewers and Tax Experts. While some opportunities require knowledge of tax laws, there are many volunteer opportunities for those who are not tax experts.

Tax-Aid Volunteer Responsibilities for All Positions

- Commit to a minimum of three volunteer sessions (an average session lasts about 5 hours) during the tax season (January-April). Most tax sites are open on Saturdays.
- Complete online training (available for on demand viewing, length of training depends on volunteer position)
- Work with individuals in a positive, patient and respectful manner

Preferred Skills, Experience, Attitude and Availability

- Bilingual skills desirable (English/Spanish, English/Cantonese, English/Mandarin, English/Russian, English/Tagalog and English/Vietnamese)
- Strong interpersonal communication skills
- Tax background desirable, but not required
- Experience working with people with low income desirable
- Enthusiastic and flexible
- Availability Saturdays or weekday evenings

Volunteer Positions

Greeters/ Hosts

- Greet Taxpayers
- Make sure they are comfortable while they wait
- Check that they have the necessary tax documents so they can be helped
- Inform Taxpayer of wait time



Interviewer

- Interview Taxpayers
- Help Taxpayers complete tax intake forms

Tax Preparers

- Familiar with Lacerte's tax preparation software
- Tax background preferred but can learn via training/shadowing experienced volunteer
- Interview Taxpayers
- Complete tax forms
- Prepare the return for filing

Translators

- Must be bilingual or multilingual
- Help to interview Taxpayer
- Facilitate communication between the Taxpayer and Tax Preparer
- Desired language skills are English/Spanish, English/Cantonese, English/Mandarin, English/Russian, English/Tagalog and English/Vietnamese preferably both verbal and written

Printer

- Prints client tax returns
- Must have working knowledge of HP printers and troubleshooting skills
- Basic knowledge of the Lacerte's tax program required

Checkout / Assembler

- Assembles the client return
- Explains e-filing/ mailing procedure to Taxpayer
- Obtains signatures to complete paperwork for return/e-filing

Tax Return Reviewers

- Review returns that have already been prepared
- Must have tax background or be a tax professional

Tax Expert

- On site to answer any complex tax questions



We also have some additional fun volunteer opportunities this year:

Tax-Aid 365 - If you are interested in helping clients during the week at Tax-Aid's offices, select this option.

Pajama squad – Are you a tax expert who wants to help but can't make it out to the tax site? Join our pajama squad and field tax related questions from the tax sites. Must be available on Saturdays to take phone calls.

Tech squad – If you would like to help with equipment set up and troubleshooting, sign up for this.

Efile and quality review team – If you know what this means, you may be qualified!

Volunteer Benefits

- Learn tax law and utilize industry standard tax software
- Meet and network with accounting, tax, legal and other professionals
- Help make a substantial difference in the lives of clients
- Make new friends

How to Apply:

Register online at www.tax-aid.org. For questions or more information email: admin@tax-aid.org.

Not able to volunteer during the tax season? No problem! **Team Tax-Aid 365** continues working into the off season and when tax sites have closed.