



Position: VITA Tax Preparer
Classification: Volunteer
Supervised By: EITC Program Coordinator

Job Summary

We are seeking friendly, detail-oriented volunteers to assist with preparing taxes as part of the Volunteer Income Tax Assistance Program. VITA exists to provide free tax assistance to many low-to-moderate income families across the country. All VITA volunteers who prepare returns must take and pass tax law training that meets or exceeds IRS standards. This training includes maintaining the privacy and confidentiality of all taxpayer information.

Main Tasks

- Complete online IRS certifications at the Advanced level
- Ensures that all reportable income is reported on the client's return and that all allowable/eligible deductions and credits are claimed for the taxpayer.
- Prepares accurate federal and state tax returns for qualified taxpayers based on information freely provided by clients
- Answers basic tax-related questions and refers taxpayers who have complex tax returns to the appropriate resources. Refer to supervisor when needed.
- Appropriately records information and processes file for quality review
- Maintains confidentiality of client information.

Location

- Joe and Vi Jacobs Center
 - 404 Euclid Ave, San Diego, CA 92114
- OR- Remote volunteering using own computer and materials

Shift Availability

Volunteers are asked to commit to one full shift weekly. This can be completed in a full eight hour shift, or completed through four-hour partial shifts.

Monday through Friday **12PM-8PM** (Partial- 12-4PM or 4-8PM)

Saturday and Sunday **9AM-5PM** (Partial- 9AM-1PM or 1PM-5PM)

Other Requirements

- Must wear facial covering while working in proximity to others
- Must pass online IRS Exams and submit certification to Home Start Volunteer Program:
 - IRS Volunteer Standards of Conduct Exam
 - Intake/Interview and Quality Review Exam
 - Advanced Tax Preparer Exam

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