



# Community Action Agency of Butte County, Inc.

*Helping People. Changing Lives.*

## VOLUNTEER JOB DESCRIPTION

<b>Position Title</b>	Advanced Tax Preparer Volunteer for VITA Program
<b>Volunteer Name</b>	
<b>Supervisor Name &amp; Title</b>	TBD – VITA Site Coordinator
<b>Organizations Mission</b>	
<p>At Butte County CAA we provide hope to people struggling with poverty to become more self-sustaining by meeting tangible needs in the areas of energy savings, affordable food, and housing.</p> <p>At Butte County CAA our mission is to serve as a catalyst to reduce poverty and its symptoms through:</p> <ul style="list-style-type: none"><li>• Providing quality services</li><li>• Developing resources</li><li>• Collaborating with others</li><li>• Advocating on behalf of the economically &amp; socially disadvantaged</li><li>• Empowering individuals</li><li>• Improving the conditions in which people live, learn and work</li></ul>	
<b>Objective of Position</b>	
<p>In collaboration with community partners, through the IRS Volunteer Income Tax Assistance (VITA) program, CAA provides no cost tax preparation assistance to families and individuals with household incomes of \$57,000 or less, persons with disabilities, the elderly and limited English speaking taxpayers. We help over 1200 families annually to file accurate tax returns, putting needed money back into their budget and benefitting our local community.</p> <p>The Advanced Tax Preparer will prepare tax returns for clients (tax payer) who may have complicating factors such as: tip income, self-employment, retirement income, income/loss from stocks or real estate, debt cancellation, etc.</p>	
<b>Key Responsibilities / Tasks</b>	
<ul style="list-style-type: none"><li>• Perform intake and interview of clients (tax payers)</li><li>• Review client tax documents</li><li>• Schedule phone meeting with clients, as needed</li><li>• Data entry</li><li>• Prepare tax returns with tax payer present</li><li>• Prepare dropped-off tax returns for later review by the client and Quality Reviewer</li><li>• Provide knowledgeable answers to client questions</li></ul>	
<b>Qualifications / Skills</b>	
<p>Volunteer Criteria:</p> <ul style="list-style-type: none"><li>• Ability to sit for extended periods of time</li><li>• Basic computer literacy and skills (keyboarding, Windows 10, web browsers)</li><li>• Must obtain the following VITA Certifications before your first scheduled shift (training and certification provided; requires ~40 hours to complete)<ul style="list-style-type: none"><li>▫ 2021 Volunteer Standards of Conduct</li><li>▫ 2021 Intake/Interview/Quality Review</li><li>▫ 2021 Advanced Tax Law</li></ul></li><li>• Tax professionals or community volunteers who are willing to be trained</li><li>• Be able to follow detailed instructions</li><li>• Be reliable and arrive on time to scheduled shifts</li><li>• Report to the site neatly groomed and wear clothing that is professional, and appropriate for the</li></ul>	

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position

- Practice discretion and maintain confidentiality with sensitive/private information
- Have strong written and verbal communication skills
- Ability to communicate and provide assistance to people with disabilities

**Location / Setting**

Chico, CA / In-door office setting

**Schedule**

Variable Tuesday-Saturday (Flexible Hours Available)

**Training & Supervision**

CAA provides IRS approved training for basic tax preparation

**Screening**

Volunteers must be over 18 years of age, pass a background check, and complete training and certification for the role(s) they intend to fill.