



VOLUNTEER JOB DESCRIPTION



POSITION: Tax Assistance Volunteer

REPORTS TO: Manager, Valley Assistance Network

LOCATION: 301 N. Cameron St. Winchester, VA 22601

PROGRAM OVERVIEW: United Way fights for the health, education and financial stability of every person in every community. We give people the financial education and tools to build a solid foundation that improves their lives and the lives of their children. For millions of Americans, tax refunds and credits are essential to their financial stability and success. That's why United Way helps people save more of their hard-earned money. So far, more than 1.3 million people have used MyFreeTaxes (a partnership between United Way and H&R Block), saving people more than \$260 million in tax preparation fees.

PURPOSE: My Free Taxes is a free, self-preparation software. For years, United Way of Northern Shenandoah Valley has advertised the program. However, access to computers is a barrier to many local families. New in 2021, Valley Assistance Network (VAN) will be offering appointments to help families access self-preparation software so they can file basic tax returns. We are giving them access to a private computer lab with supervision to assistance with any technical issues and basic questions. Volunteer support is critical to the operation of this new program.

DUTIES:

- Provide support for clients who use the website MyFreeTaxes.com to prepare and file tax returns
- Provide basic technical assistance using computer software and printers
- Help clients navigate frequently asked questions (FAQ's) for filing taxes
- When necessary, help clients connect with tax specialists to answer questions via the MyFreeTaxes phone or chat feature
- Refer clients to community resources to obtain additional assistance
- When necessary, recommend basic skills, habits and practices to improve their financial situation, including but not limited to managing expenses and prioritizing bills

QUALIFICATIONS/SKILLS REQUIRED

- Basic-Moderate computer skills
- Prior experience filing taxes
- Possess an understanding of the dynamics of poverty, as well as an understanding of, and sensitivity to, serving diverse populations
- Genuine desire to help people to achieve their goals
- Professional experience in any sector of the financial industry is a plus, but not required
- Volunteer Income Tax Assistance (VITA) Certification is a plus, but not required
- Priority will be given to bilingual applicants

TIME COMMITMENT: Volunteers are asked to commit to one day a week to volunteering in this role (preferably the same time each week in a 3 to 4-hour shift). Scheduling is extremely flexible and can include evening and weekend hours. A virtual standard of conduct training through the IRS is required.

Note: This is an in-person position. All clients and volunteers will be required to wear masks and follow COVID-19 protocols for workspaces.

CONTACT: Please contact Emily Fultz at (540) 773-3178 or Efultz@unitedwaynsv.org for more information.