



Tax Preparer

As a Tax Preparer volunteer, you will prepare federal and state tax returns based on the information provided by the taxpayer in the Intake Interview. This role requires you to complete the Tax Preparer training provided by United Way of Tucson and Southern Arizona. In this role, you will have the opportunity to spend the most time directly working with the people we serve.

What is VITA?

United Way of Tucson and Southern Arizona's VITA program is dedicated to providing free, quality tax preparation services to families and individuals throughout Arizona. By becoming a VITA volunteer, you will have a direct impact on the financial well-being of hundreds of households in your community by helping them maximize their refund and receive one of the largest paychecks they'll receive all year.

What will I do?

- Meet with taxpayers and their families to prepare accurate federal and state tax returns
- Answer tax-related questions and advise taxpayers
- Maintain confidentiality of taxpayer information

What makes me a good fit?

- Good interpersonal skills and comfortable working with a wide range of people
- Thorough attention to detail
- Strong verbal and communication skills
- **No prior tax knowledge necessary**, we will provide all necessary training

How much time will I spend volunteering?

- Minimum of 40 hours during tax season
- One shift per week from mid-January to mid-April

What will I get out of it?

- Demonstrate a commitment to community service
- Satisfaction of knowing that you had a direct impact on your community
- Various locations and schedules allow for flexible volunteer hours
- Free IRS-approved tax preparation training by tax experts
- Develop a life-long skill
- Knowledge of and hands-on experience in income tax preparation with opportunity for advancement into leadership roles
- IRS-approved Continuing Credit for Enrolled Agents and accountants
- Experience in customer service and one-on-one taxpayer consultations
- Expand your resume

How do we support you?

- Mentorship from highly experienced volunteers and United Way staff
- Opportunities for development into leadership roles
- Connections to other unique volunteer opportunities
- **Free** training and IRS VITA certifications

How do I get involved?

- Attend 24 hours of tax law training (in-person or online at your own pace)
- Pass the IRS certification exam to achieve certification at the Advanced level
- Pass the IRS Standards of Conduct exam
- Pass the Intake/Quality Review exam
- Complete the Hub Training (required for virtual volunteers)

Visit unitedwaytucson.org/vita/volunteer to get started!