



## Volunteer Client Liaison

The Tax Help program provides free income tax preparation services to Austin's low- and moderate-income families. By helping people claim all of the tax credits for which they are eligible, volunteers can give their neighbors a chance to build a financial future. In 2020, the Tax Help team will prepare **20,000 tax returns** and bring over **\$35 million** into the pockets of those who need it most in our community. To do this, we need more than **600 volunteers!**

As the first person a taxpayer encounters, the Client Liaison welcomes clients, screens for eligibility and preparedness, collects documents, and assembles the information necessary for the Tax Preparer to complete the tax return in an efficient manner. The Client Liaison plays a critical role in ensuring that clients have a quality experience.

### Volunteer Client Liaison Responsibilities:

- Complete required online training and IRS certification (support sessions available)
- Welcome and greet clients as they arrive
- Conduct a brief interview to ensure client eligibility and preparedness
- Help clients complete forms as needed
- Review identification and tax documents for authenticity
- Maintain a clutter-free and organized reception desk and waiting area
- Maintain the order in which clients should be served by Tax Preparers
- Protect client privacy and confidentiality
- Provide excellent customer service

### Volunteer Training:

Volunteer Client Liaisons must complete online training provided by Foundation Communities and complete IRS certifications on "Volunteer Standards of Conduct" and "Intake/Interview & Quality Review." Training and certification is at your own pace and usually takes two hours.

### Volunteers Should Be Comfortable:

- Using Windows-based software
- Working with a team and with people from all walks of life
- Volunteering in a fast-paced environment
- Managing organization systems and prioritizing tasks

### Volunteer Benefits:

- Convenient tax site locations that offer daytime, evening, and weekend shifts
- Flexibility to set own schedule and choose volunteer site(s)
- Hands-on experience
- Recognition events, awards, and additional perks at increasing service levels

### Volunteer Commitment:

We ask volunteers to serve an average of 3 hours per week during the tax season, January 20 to April 15, 2020.

Volunteers who serve a minimum of 10 hours will be asked to continue serving in the off-season through our smaller year-round program but have no obligation to do so.

**For more information or to sign up**, please visit our website at <https://foundcom.org/volunteer-with-tax-help-program/> or contact: Danielle Girard, Volunteer Coordinator, Tax Help Program, [Danielle.Girard@foundcom.org](mailto:Danielle.Girard@foundcom.org), 512-610-7967

*As an organization committed to diversity, equity, and inclusion we seek applicants from all backgrounds to join our volunteer teams, and we encourage our volunteers to bring their authentic, original, and best selves to their service work.*