



Volunteer Out-of-Scope Tax Preparer

The Out-of-Scope Tax Preparation program serves low-income clients whose tax situations fall outside the limits placed on the Community Tax Centers as an IRS-sponsored VITA program. Out-of-Scope volunteers provide a free alternative for clients who would otherwise need assistance from a paid tax preparation service. The Out-of-Scope program is a valuable complement to the Community Tax Centers and ensures that as many clients as possible are served when they come to Foundation Communities for assistance. Volunteers who serve as Out-of-Scope Tax Preparers are, by necessity, highly experienced in tax preparation; prospective volunteers are screened prior to acceptance. The team works with minimal supervision and coordination by Foundation Communities' staff.

Volunteer Out-of-Scope Tax Preparer responsibilities:

- Complete required training and IRS Volunteer Tax Preparer certification test annually to Military level
- Manage volunteer schedule and availability using online scheduling tool
- Work directly with families who need help preparing tax returns at one of the Community Financial Centers operated by Foundation Communities
- Prepare tax returns by entering data into software (currently TaxWise) provided by the program
- Explain the tax return to the client and answer questions
- Report service hours to the Community Tax Centers Volunteer Coordinator on a monthly basis

Volunteer Training:

Volunteers are expected to attend annual Community Tax Centers training as possible. Alternatively, volunteers can complete independent study using IRS training materials. Training/study must cover topics identified as VITA Basic, Advanced, and Military, as well as topics which are identified annually as out-of-scope for VITA but in scope for this program. (See current Out of Scope handout on www.ctcresources.com.)

Volunteer should be comfortable:

- Using Windows-based software and Google Office (training available)
- Providing excellent customer service to people from all walks of life
- Problem-solving with minimal collaboration or supervision

Volunteer Benefits:

- Free training on tax law and tax return preparation
- Convenient tax center locations that offer daytime, evening, and weekend shifts
- Flexibility to set own schedule and choose volunteer site(s)
- Resources and staff support at each tax center
- Hands-on experience

Volunteer Commitment:

We ask volunteers to serve 20 or more hours during the annual tax season, mid-January to mid-April. Volunteers may be asked to continue serving in the off-season for our smaller year-round program but have no obligation to do so.

For more information, please contact:

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