



## **Volunteer Out-of-Scope Tax Preparer**

The Out-of-Scope Tax Preparation program serves low- and moderate-income clients whose tax situations fall outside the limits placed on the Prosper Centers' Tax Help program 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 Tax Help program 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 Prosper 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 Tax Help Volunteer Coordinator on a monthly basis

### **Volunteer Training:**

Volunteers are expected to attend annual Tax Help 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](http://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.

*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.*

### **For more information, please contact:**

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