

Tax Site Tax Preparer

Volunteer Job Description

DUTIES:

- Prepare basic 1040 tax returns and related schedules
- Prepare a correct and accurate return based on information provided by taxpayer
- Provide a copy of the completed return to the taxpayer
- Answer tax-related questions
- Maintain confidentiality of taxpayer information
- Ensure no compensation of any kind is accepted for the volunteer services provided
- Meet “qualifications” and complete “required training” listed below

QUALIFICATIONS:

- Complete the free IRS Link and Learn online tax law course offered and become certified at the “Advanced” level
- Complete the IRS TaxSlayer software training
- Complete the IRS Standards of Conduct test
- Commit to volunteering a minimum of 20 hours during tax season
- Be a United States Citizen or in the United States legally

REQUIRED TRAINING:

New ASU Volunteers – attend the “Getting Started” Session in November
IRS Link and Learn Tax Law Course (for NEW and RETURNING volunteers)
Available online – must be completed prior to Volunteer Orientation

Volunteer Orientation (for NEW volunteers only)

Online session for NEW volunteers only. Date and time to be distributed via email.

TaxSlayer software training. A limited number of online classroom sessions will be offered in the fall of 2021 or January 2022. Volunteers will receive an email with the dates and times after the Volunteer Application is completed.