



Volunteer Tax Preparer  
Spring, 2016



*Position Description:* Tax preparers with UMBC VITA (Volunteer Income Tax Assistance) will complete personal income tax returns for low income individuals and families from the greater Baltimore area on UMBC's campus. They will also advise clients on avoiding unnecessary fees and leveraging refunds over time through bonds and savings accounts. Tax season is between mid-February and early April and appointments will be on designated Saturdays during the season. Volunteers will be working as a part of the Baltimore CASH (Creating Assets, Savings, and Hope) Campaign which partners with VITA to provide tax preparation services to low-income families throughout the greater Baltimore area.

*Qualifications:* This opportunity only requires IRS tax preparer certification. Certification is earned by attending three training sessions, one online and two in a classroom setting during the month of January, as well as passing a certification exam at the end. Training is provided by Baltimore Cash Campaign and the IRS. Completing the training and passing the exam will officially give you IRS certification and authorize you to complete tax returns during the spring semester. These training sessions will amount to about 15 hours total, however you may need to spend additional time preparing for the exam. While this opportunity is certainly a helpful supplement to those pursuing financially related majors it is in no way needed. Knowledge of tax preparation and tax law is helpful to almost any field of study.

*Responsibilities:* Completing the free training sessions in January. Interviewing clients and preparing and reviewing documentation needed to accurately complete tax returns. Administrative tasks at the VITA site. Reviewing completed tax returns. Doing follow-up interviews with clients and completing quality reviews.

*Perks:* This is an excellent opportunity to gain both work experience related to the field of financial economics and IRS certification for resume building. You will also be actively engaging with and providing aid to those in need of help in your broader community. Finally, internship credit through the economics department or the Shriver Center is also being offered on an individual basis.

*Schedule:* Tax Preparation Sessions will be on the following Saturdays, 9am-2pm: February 27, March 5, March 19, March 26, and April 9, 2016. Attendance at all of these sessions is strongly encouraged.

*Questions?* Contact Trisha Wells at [twells@umbc.edu](mailto:twells@umbc.edu) or 410-455-2393.

Apply online at: [financialsmarts.umbc.edu](http://financialsmarts.umbc.edu)