

# Volunteer

The mission of Next Step KC is to offer financial products, educational opportunities, and services, including free tax preparation, which move people from financial dependency to independence and stability.

## **Site Coordinator**

Manage all facets of a VITA site, including managing volunteers, setting up the Site, transmitting returns, contacting clients concerning rejected returns, retransmitting corrected returns, and collecting and submitting data. The Site Coordinator must be comfortable with using a computer and have the ability to use Microsoft Windows-type programs. In general, advanced-level tax certification is required.

## **Financial Specialist**

Help Next Step KC clients understand the value of transactional and/or savings accounts. The Financial Specialist may open accounts for clients who choose to establish one of these relationships. In addition, the Financial Specialist matches clients with partner organizations that provide financial literacy, asset building, and family self-sufficiency programs. Computer and Internet experience is required for this position. A background in financial education or financial services is helpful.

## **Greeter**

Act as the initial contact to the taxpayer, helping coordinate traffic flow and ensuring that the taxpayer qualifies for free tax assistance. The Greeter has each client sign in and provides information sheets to be completed. No income tax knowledge is necessary for this position.

## **Information Assistant**

Gather appropriate documentation for the Tax Preparer, reviews the client information sheets for completion, and provides appropriate data as noted on information sheets. No income tax knowledge is necessary for this position.

## **Interpreter**

Facilitate bilingual communications between the clients and the tax preparer. No income tax knowledge is necessary for this position.

## **Quality Control Reviewer**

Check each return for accuracy and completeness before it is transmitted. The Quality Control Reviewer completes and initials a checklist for each return. Advanced-level tax certification is required.

## **Tax Preparer**

Review client documentation, interview the client, and prepare the client's personal federal, state, and local income tax returns on a computer. You must be comfortable with using a computer. Basic-level tax certification is required.

## **Tax Coach**

Help taxpayers who choose to prepare their own returns under the assisted self-preparation model. The Tax Coach must be comfortable with using a computer and have the ability to use Internet tax programs. It is recommended that you be familiar with completing your own tax returns before working in this position. Basic-level tax certification is required.