

## CASH Free Tax Preparation Volunteer

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Are you over 18?      YES      NO

Please provide contact information below and circle your preference for communications.

Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Which position(s) are you interested in volunteering for? (check all that apply)

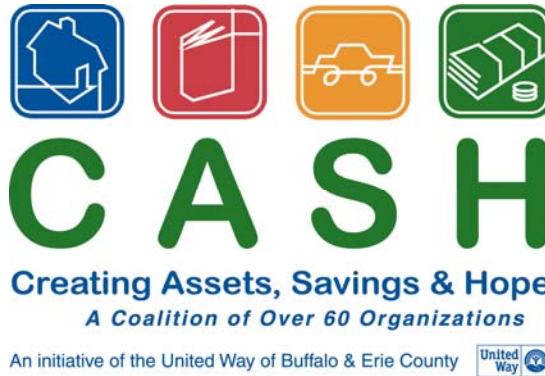
- Greeter
- CASH Advisor
- Tax Preparer
- Tax Expert

\_\_\_\_\_ My organization would be interested in sponsoring a free tax site.

\_\_\_\_\_ I have assisted with free tax preparation in the past.

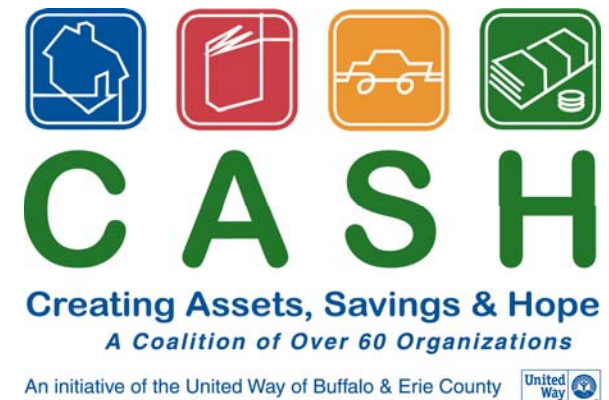
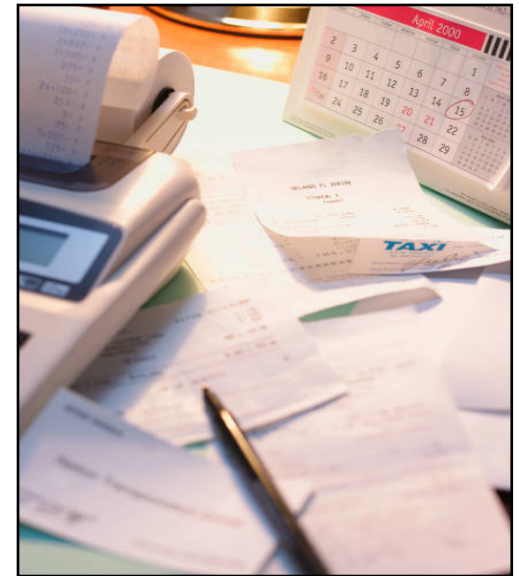
## Funding Sources :

Bank of America  
Community Foundation for  
Greater Buffalo  
HSBC Bank  
The John R. Oishei Foundation  
Key Bank  
M&T Charitable Foundation  
United Way of  
Buffalo & Erie County  
US Department of Health and  
Human Services; Office of  
Community Services



For more information,  
Please contact:  
**Justin Moscati**  
Community Engagement Coordinator  
Creating Assets, Savings & Hope (CASH)  
United Way of Buffalo & Erie County  
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Justin.Moscati@uwbec.org

## Volunteer with CASH's Free Tax Preparation



[www.cashbuffalo.org](http://www.cashbuffalo.org)

# CASH Free Tax Preparation

Creating Assets, Savings & Hope (CASH) Buffalo is seeking volunteers for its free tax preparation network.

Over the last three years, the local volunteer network has completed more than 37,000 state and federal returns and brought more than \$40 million dollars into the community via tax refunds and credits. With your help, we can increase these numbers and reach even more hard working, low-income persons.

Positions Include:

- Greeter
- CASH Advisor
- Tax Preparer
- Tax Expert

\* see descriptions for more information.



All necessary training will be provided at no cost by Creating Assets, Savings & Hope (CASH) Buffalo.

## Greeter

- Serves as first point of contact for taxpayer;
- Greets taxpayers;
- Provides overview of site & services;
- Answers general questions;
- Maintains line of tax clients for tax preparation and other services.

### Required Training: Site Orientation.

Each site will provide overview of location and services.



## CASH Advisor

- Determines taxpayers eligibility for service;
- Assists taxpayers in completing intake forms;
- Reviews/sorts taxpayer documents (e.g., Social Security, W-2 forms);
- Provides information about financial education and asset building opportunities;
- Prepares materials for tax preparers.

### Required Training: Site Orientation and Advisor Orientation.

Advisor orientation will be provided by CASH and will teach volunteers how to use the "CASH kit" to advise clients on potential local resources they may wish to use.

## Tax Preparer

- Prepares tax returns, prints returns;
- Reviews returns; and discusses next steps with taxpayers;
- Depending on training and experience, tax preparer may complete basic or special returns (e.g., back year, schedule C).

### Required Training: Site Orientation, IRS Certification, Taxwise Software.

CASH will provide free tax preparation training including 12 hours of classroom based instruction on federal and state tax law and how to use the Taxwise software program. Trainees will be required to score 80% or higher on the IRS basic-level certification test prior to serving as a CASH tax preparer.

## Tax Expert

- Experienced tax preparer, accountant or CPA to act as roaming resource person for preparers and to assist in resolving challenging issues;
- Reviews returns for accuracy; quality control.

### Required Training: IRS Certification, Taxwise, Software and Past Experience.

