

Free Tax Preparation Network Volunteer Needs*
Creating Assets, Savings & Hope (CASH)
An Initiative of the United Way of Buffalo & Erie County

Creating Assets, Savings & Hope (CASH) is seeking volunteers for its free tax preparation network. Over the last three years, the local volunteer network has completed more than 38,000 state and federal returns for families and individuals 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.

Position	Brief Description	Required Training
Greeter	Serves as first point of contact for taxpayer; Greets taxpayers; provides overview of site & services; answers general questions; maintains queue for tax preparation and other services.	Site Orientation
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	Site Orientation Advisor Orientation
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).	IRS Certification Taxwise Software
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	IRS Certification Taxwise Software Past Experience

* - All necessary training – with the exception of past experience – will be provided at no cost by Creating Assets, Savings & Hope (CASH).

To volunteer, contact: Justin Moscati, Creating Assets Savings & Hope (CASH)
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