



e4c Make Tax Time Pay Volunteer Tax Preparer

Supervisor: Site Coordinator

Program Description: e4c Make Tax Time Pay (MTTP) offer individuals and families with low incomes free tax preparation, information and applications on government benefits and subsidies, as well as financial resource information.

Time, Schedule, and Commitment:

- 3-5 hours a week during the months of March and April
- Each seasonal tax site operates on a different schedule, a variety of shifts are available including daytime, evenings, and weekends.
- Minimum of 4 shifts during tax season

Location: Make Tax Time Pay has various locations in the Edmonton area.

Responsibilities:

- Works to demystify the tax filing process and ensure that the person being served is comfortable with and knowledgeable about the tax filing process
- Completes basic tax returns using the Ufile software and files the taxes online
- Checks to make sure all needed information is present and reported correctly
- Ensures that the intake form is fully filled out
- Maintains confidentiality of all personal information
- Cannot complete complicated tax returns involving self-employment income, investment income, or tax returns for the deceased
- Completes relevant portions of the intake form in a clear and legible manner for each individual/family

Skills, Abilities, and Knowledge Required:

- Must be able to work with socially and culturally diverse groups experiencing poverty in a welcoming and non-judgemental manner
- A basic familiarity with tax filing (having completed your own taxes once is fine)
- Comfortable with handling personal financial information in a professional manner

Screening Requirements:

- Complete a volunteer application (include references)
- Must register with the CRA as a volunteer tax preparer
- Register with the CRA for an EFile Number (this process may take up to 30 days)
- Police Information Check with Vulnerable Sector Search

**Orientation/Training to be completed:**

Volunteers will be provided with a 3 hour training session during the month of February/March that includes an orientation to e4c and our Make Tax Time Pay Program. Training also includes going through the complete tax filing process. An additional 2 hours of webinar training from the CRA is required to be completed at home.

Benefits of the Position:

- Volunteers gain valuable experience and insight working with socially and culturally diverse communities
- An opportunity to directly contribute to supporting the financial wellbeing of Edmonton's most vulnerable citizens
- Work in a relaxed team environment that promotes relationship building
- An excellent opportunity to improve financial skills and knowledge about taxes
- e4c can be used as a reference.

Why this position is valuable and how it contributes to e4c:

- Directly contributes to the financial well-being of low income individuals and families by supporting them to get tax refunds, tax credits, and government benefits
- Increases e4c's public profile and relationships with other organizations