

Welcome Tax-Aide Volunteers!

Get ready to make a substantial difference in your community.

As an IRS certified tax preparer, you will join a dedicated group of volunteers who assist thousands of low and moderate income taxpayers and seniors to file their taxes.

The average family or individual we helped last year made \$23,309 and received \$1,534 in federal refunds with **FREE** tax preparation. These dollars made a real difference to people living in your community.



How do I become a Tax Counselor?

We want every one of our volunteers to have a gratifying and enjoyable experience. We have volunteers who have been preparing taxes with AARP Tax-Aide for over 25 years who continue to find their service rewarding. To ensure a successful tax season for you and our taxpayers, here are the steps.



- 1** Attend orientation for additional information on training, IRS certification, locations and more.
- 2** Register for training online.
- 3** Study for your IRS certification and attend your class. We will support you by phone and at a computer study lab.

4 Take and pass the Basic, Intermediate and Advanced IRS certification tests. These tests are open-book and you have more than one opportunity to pass if needed. You can even work with a friend.

5 Once you are certified, you will be assigned to a tax preparation site based on interest and availability where you will work with other volunteers.

6 Have a fun and successful filing season.

Attend our appreciation celebration!



What are my training options?

We offer training options to fit your learning style and schedule. Classes are offered during the week and on weekends in several locations.

Independent study: With our most flexible option, volunteers study independently. They get a complete study packet and have access to interactive online training. The time for independent study varies; 30-40 hours is a good estimate for most people. Following independent study, volunteers attend a one-day class that covers tax preparation software, Oregon tax law and administrative policies.

Classroom: For volunteers who prefer a face-to-face setting, we have classroom training lasting several days. Training takes place in a computer lab for hands-on learning.

Already have tax knowledge? You can simply pass the tests and attend a 1-day class primarily covering administrative procedures and tax software we use.



Finally, we ask...

- ◆ Please be available to prepare taxes from February 1 through April 15.
- ◆ Contribute 4 hours or more per week during the tax season.

You can expect...

- ◆ An appreciative and encouraging environment that supports diversity in volunteers and taxpayers
- ◆ Ongoing support to answer questions and review of all returns for accuracy
- ◆ Gratitude from the taxpayers you are helping

To make a difference!!!

Questions? Contact volunteer@cashoregon.org, 503-243-7765, visit www.CASHOregon.org

AARP Tax-Aide

AARP Tax-Aide is the nation's largest, free, volunteer-run tax preparation and assistance service. CASH (Creating Assets, Savings and Hope) Oregon is a community based non-profit organization created to help working families improve their financial future. By working together, we have expanded free tax services throughout Oregon.

CASH OREGON
A return on hope