

## Volunteers are Our Most Valuable Asset

As an IRS certified volunteer, you will assist low and moderate income taxpayers and seniors to file their taxes. You will be helping:

- People increase their assets by filing their taxes at no charge.
- Neighbors grow and prosper by putting millions of dollars back into the community.

The Earned Income Tax Credit, along with other valuable tax credits, go unclaimed every year. You can assure taxpayers they will receive all available tax benefits to maximize their refund.



You get a chance to learn how to prepare and file taxes, and develop valuable job skills. You can volunteer during the day, after work, or on the weekends at locations throughout the Tri-County area. You join people from all backgrounds and experiences in serving your community.

Last year, more than 300 volunteers helped over 14,600 taxpayers file returns and bring \$16.7 million in federal tax refunds into the Tri-County area. Our volunteers are not just our greatest asset, but a valuable asset to our community.

## What Our Volunteers Say...

“My experience [volunteering] was fantastic! I felt well-supported and informed by the training and site leaders, and very appreciated by the clients. It was rewarding and exciting to guide someone gracefully and supportively through a task with such a potential to be emotionally difficult. I also learned enough to go back and file [my own] amended return that resulted in a \$1200 check from the IRS, so in my case, I felt very well compensated!”

Irena

“Volunteering with the ... program is a real, tangible way of knowing that I'm making a difference in my community. When I write a check to charity, I don't know where the money is going or who is being helped. This investment of my time has names, faces, and hugs. Yes, I've gotten hugs from many of the people I've assisted. It doesn't get any better than that.”

Suzanne

I learned a lot thanks to all of you and my other teammates at Shute Park library. I felt appreciated and I am thankful that I can do a small part to help my community. Count me in for next season, and thanks for the opportunity to work with such great people.

Anne

*For questions about volunteering for tax preparation, other opportunities, contact:*

Volunteer Manager  
503-243-7765  
volunteer@cashoregon.org  
www.CASHOregon.org

# WELCOME VOLUNTEERS



*Get ready for an opportunity  
to make a substantial  
difference in your community.*



and  
**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 the Tri-County area.*

## How do I become a Volunteer?

Our goal is to give every one of our volunteers a gratifying, enjoyable and supportive experience. We have volunteers who have been preparing taxes with AARP Tax-Aide for over 35 years who continue to find this service rewarding.

To ensure a successful tax season for you and our taxpayers, here are the steps.

**1** Apply on line at [www.CASHOregon.org](http://www.CASHOregon.org) or contact the Volunteer Manager, at 503-243-7765 or [volunteer@cashoregon.org](mailto:volunteer@cashoregon.org).

**2** Meet with a volunteer who has prepared taxes in previous years to discuss the volunteer experience and requirements.

**3** Attend an orientation to receive additional information on training and IRS certification. During orientation you will register for training, submit your preferred schedule and tax site location.

**4** Study for your IRS certification and attend your class. During this time you will have support available from an assigned mentor and your instructor. Practice labs will also be available. (See training options.)

**5** Take and pass the Basic, Intermediate and Advanced IRS certification exams. These exams are open-book, not timed and you have more than one opportunity to pass if needed.

**6** Once you are certified, you will be assigned to a tax preparation site based on interest and availability.

**7** Have a fun and successful filing season assisting your neighbors and friends.

At the end of the season, attend our volunteer appreciation celebration!

## How Do I Get Training?

We offer training options to fit your learning style and schedule. Classes are offered on multiple days in several locations. During your training you will have support available from an assigned mentor and access to computer practice labs staffed by experienced tax preparers. Training is free and volunteers may receive continuing education credits for successful completion.

**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 more traditional setting, we have classroom training. Class is offered on consecutive days or Saturdays.

**Already have tax knowledge?** You can simply pass the test, attend administrative training and familiarize yourself with the tax software.



Visit our website at [www.CASHOregon.org](http://www.CASHOregon.org) for more information.

## What Should I Expect?

When you express interest in becoming a volunteer, we want to make sure you have a good understanding of your investment and the rewards you can expect.

### **What we ask of you:**

1. Complete an application and interview.
2. Attend an orientation meeting and register for training at a time you can commit to attend.
3. Sign a volunteer agreement to ensure accurate tax returns are completed confidentially and fairly without discrimination and without any charge for services.
4. Pass the Basic, Intermediate and Advanced IRS certification exams in a timely manner so that you can be scheduled at a tax site that is convenient for you.
5. Be generally available to prepare taxes from February 1 through April 15.
6. Contribute 4 hours on average per week during the tax season.

### **What you can expect in return:**

1. Training on federal and state tax preparation and tax software.
2. An appreciative and encouraging environment that supports diversity in volunteers and taxpayers.
3. Ongoing support to answer questions and review all returns for accuracy. Including an assigned mentor and access to computer practice labs staffed by experienced tax preparers.
4. The knowledge that you have contributed to your community in a tangible way.