

# Journey House Volunteer Opportunities for Volunteer Income Tax Assistance!

## Learn to Prepare Taxes by Becoming a Tax Volunteer

Journey House is looking for people to provide free tax help in 2019. The Volunteer Income Tax Assistance (VITA) program offer free tax help across Milwaukee County for people with low-to-moderate incomes. In 2018, Milwaukee VITA volunteers prepared more than 11,000 federal and state and homestead tax returns at no cost to families returning more than \$8m in tax credits and refunds to Milwaukee County residents. Please join us in making 2019 a stellar year by becoming a tax volunteer and make a difference in your community.

You will help residents maximize their tax returns by avoiding refund anticipation loans. As a volunteer, you will receive free training; IRS Certification; help people begin to build financial assets; and be part of a program that helps thousands of households every year.

Here are five good reasons why you should consider becoming a VITA volunteer.

1. **Flexible hours.** Volunteers generally serve an average of three to five hours per week. The program is usually open from mid-January through the tax filing deadline in April.
2. **VITA sites are often nearby and need your help.** Sites are set up in neighborhoods over Milwaukee County for this past filing season. They are often set up in community centers, schools, community/faith based organizations and similar places. Chances are good that you can volunteer at a site near you.
3. **No prior experience needed.** You'll receive specialized training and can serve in a variety of roles. If you are fluent in another language, you may be able to help those who speak that language.
4. **Free tax law training and materials.** Learn how to prepare basic tax returns and learn about all the tax deductions and credits that benefit eligible taxpayers.
5. **Continuing education credits for tax pros.** Enrolled Agents and non-credentialed tax return preparers can earn credits when volunteering as a VITA instructor, quality reviewer or tax return preparer. Log on to the IRS VITA site for more information.

### General Skills Needed:

- Must be a minimum of 18 years old
- Strong customer service skills
- Friendly, dependable, flexible and a team-player
- Commitment of a minimum of 30 hours during tax season (Mid-January to Mid-April)
- Bilingual helpful, but not required

### Tax Preparation:

- Complete new and/or refresher tax law and software training
- Certify at the Advanced VITA tax preparation level (All training provided)
- Explain complete tax forms to clients, answering questions as needed
- Maintain confidentiality of client information

### Available Opportunities

- Tax Preparers; Greeters; and Quality Reviewer

IRS-tax law certified volunteer preparers establish the greatest degree of public trust by providing quality tax preparation services and uphold the highest ethical standards. For complete position descriptions, visit our website at <http://www.Journeyhouse.org> Interested persons, businesses and organizations may contact Ritchie Martin at [Rmartin@journeyhouse.org](mailto:Rmartin@journeyhouse.org) and 414.647-0548. To submit your interest, please complete the Volunteer Interest application and the Background Information Disclosure and forward to Ritchie Martin at the email above.



Journey House  
 2110 West Scott Street  
 Milwaukee, WI 53204  
 Tel: 414.647.0548  
[www.journeyhouse.org](http://www.journeyhouse.org)

**Volunteer Income Tax Assistance (VITA)  
 Volunteer Interest Application**

The Success or failure of the VITA Program depends largely on the dedication of valuable volunteers like you. Therefore, on behalf of the many taxpayers you will be serving and the Journey House Board and Staff, thank you in advance for your expertise, skill and time. Your dedication is very much appreciated.

<b>Today's Date:</b>		
Name	Preferred Title Mr/Mrs/Miss/Ms	
Tel. No.	Tel. No.	
Address:		
E-Mail:		
Where did you hear about volunteering for Journey House Volunteer Income Tax Assistance (VITA) Program?		
<input type="checkbox"/> I am a returning volunteer <input type="checkbox"/> A friend or family member told me <input type="checkbox"/> Media/Social Media <input type="checkbox"/> Website <input type="checkbox"/> A Journey House employee told me <input type="checkbox"/> Other (Please specify) _____		
What position do you want to volunteer for: Tax Preparer   Quality Reviewer   Intake(Greeter)		
<b>What are your skills (Please check all that apply)</b>		
Admin /Clerical	Admin / Clerical	
Strong organizational and time-management skills.	Processing Information	
Reading Comprehension	Contact and Connect	
Adept in Technology	Documenting/Recording Information	
Active Listening	Evaluating Information to Determine Compliance with Standards	
Form Filling	Oral Communication	
Complex Problem Solving	Document Management	

Have you prepared income tax returns before?

If yes, have you prepared income tax returns for yourself or others (Please circle one)

How many years?

Have you prepared tax returns using a computer?

What software did you use?  
 Do you use computers on a regular bases at work or at home?  
 Do you have a PTIN Yes  No

Do you have any Criminal Convictions (other than minor driving offences)? Yes  No   
 If yes, please give date and nature of conviction. Please note, that a criminal offense, does not disqualify you from the VITA Program.

Do you speak a language other than English Yes  No  Language \_\_\_\_\_

When are you available for voluntary work?  Totally Flexible (Minimum of 30 hours)

	Monday	Wednesday	Friday	Saturday
Morning				
Afternoon				
Evening				

Time Management  Tax Law

Please give two references who would be willing to supply a character reference (these must not be family members)

Name	Name
Address	Address
1.	
2.	
Tel. no.	Tel. no.

## Agreement and Signature

As a Volunteer, I pledge not to divulge, distribute or make public policy any client’s personal or financial information.

My use or access to this information requires me to protect this data and maintain the highest degree of confidentiality regarding its use both within the Journey House and/or VITA program and outside of the Journey House and/or VITA program and in the community at large.

My use and/or access to confidential material as a result of my duties or assignment are to be limited to only the information required by those duties or assignment. If I use my duties or assignment to access information not required for my assignment, such action will constitute misuse. Deliberate efforts to use my duties to gain access to data with respect to which I am not authorized, by breaching installed security provisions or getting around them, will constitute an abuse. If either misuse or abuse occurs, I will be prohibited from performing volunteer duties within the Journey House and/or VITA program.

By signing this form, I affirm that the facts set forth in it are true and complete. I understand that any false statements, omissions, or other misrepresentations made by me on this form may result in my immediate dismissal. **I commit to attending all the required training through the VITA program, passing the IRS certification and serving as a Journey House VITA volunteer for hours specified above in the availability stated on page 2 (minimum of 30 hours).**

Signature _____	Date _____
Print Name _____	

This application along with other documents can be sent using the following methods:  
United States Postal Service, Scanned electronically and emailed or dropped off. Please use information below.

**Ritchie T. Martin, Jr.** | Journey House VITA Coordinator  
**Journey House** | 2110 West Scott Street  
Milwaukee, WI 53204  
*p.* 414.647.0548 x109 | *f.* 414.647.0266  
[Rmartin@journeyhouse.org](mailto:Rmartin@journeyhouse.org) | [www.Journeyhouse.org](http://www.Journeyhouse.org)

For office use only	Notes
Volunteer Position _____	
Volunteer Start Date _____	
Certifications _____	