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University of Minnesota Retirees Volunteer Center

VOLUNTEER OPPORTUNITY

AARP Tax Preparation Aide

AARP Tax-Aide, the nation's largest free, volunteer-run, tax preparation and assistance service, is seeking volunteers to add to its cadre of volunteer tax preparers who assist taxpayers in need of help with preparing and filing their income tax returns. Volunteers do not need to have previous experience; all relevant training and certification is provided. You do not need to be an AARP member to volunteer.

Description of volunteer duties:

As a Tax Preparer/Counselor you will be a member of a team of preparers/counselors assigned to a specific site:

- You will work with taxpayers directly, filling out tax returns and helping them seek a refund. New preparers/counselors receive approximately 40 hours of training on tax law and software use over a six-day period, typically occurring within the first two weeks of January.
- In addition to the above training, home-study exercises (approximately 20 to 40 hours) are required to complete sample problems, certification problems, and testing.
- Upon successful completion of training and testing, new and returning volunteers are certified by the IRS and AARP to assist taxpayers with completion of Federal returns. Minnesota volunteers are certified similarly by the Minnesota Department of Revenue, and AARP, to complete returns for Minnesota Income Tax (M-1) and Minnesota Property Tax Refund (M1PR).
- Work assignments are typically 4 to 6 hours per day, one or two days per week, from the beginning of February through mid-April.
- This is an unpaid position. Mileage expenses can be reimbursed if requested.

After the classroom training is over, there are practice exercises and certification problems to do at home typically taking 30 to 40 hours. Certification problems and tests need to be completed by the end of January. Once you have successfully completed certification, you will be assigned to a tax preparation site in the vicinity of your home. Typically, the tax preparation sites are at libraries or community centers. There are volunteers needed throughout the metro area and for a number of places in out-state Minnesota.

Dates, times, and locations: Orientation for new volunteers will be in mid-December 2022.

Comprehensive training and certification will occur in January 2023. The tax preparation season will be from early February through mid-April.

For new Tax Preparer/Counselors, classroom-style training will occur in the first two weeks in January, followed by completion of practice problems in the second half of January, and then certification exams in late January. Classroom training will be held at several locations in the Twin City Metro Area and out-state Minnesota.



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The tax preparation season runs from the beginning of February through mid-April. Most sites are open starting at 9am or 10am and end for the day around 3pm or 4pm; a few sites may be open in the early evening hours. **Volunteers must commit to a minimum of one shift per week.** Typically, volunteers do two days a week. If you have a vacation planned during tax season, your vacation plans can easily be accommodated.

Various tax preparation sites are located throughout the Twin Cities and in out-state Minnesota. Volunteers will be assigned to a site in proximity to their home.

Volunteer eligibility requirements

- Ability to accurately enter data into a laptop computer is required; a laptop computer with tax software is provided.
- Ability to review and understand IRS and MnDOR tax regulations

Physical expectations/limitations

- Must be able to sit at a table for extended periods of time.
- Must be able to accurately enter data into a laptop computer
- Must be patient and understanding with persons having wide range of physical, mental, and emotional characteristics.

What to wear: An official Tax-Aide shirt will be furnished to volunteers at the start of the tax season.

Parking, transportation, and food: Volunteers are responsible for arranging their own transportation to and from training facilities and the assigned preparation sites. Preparation sites have free parking or parking passes will be issued.

Volunteers are responsible for their own snacks and lunches.

• Information required to register:

Go to <https://www.aarp.org/forms/volunteer-tax-aide> and then click on the “Create Account” link to get started in becoming a Tax-Aide volunteer. You do not need to be a member of AARP to be a volunteer.

For more information regarding this AARP Tax-Aide volunteer opportunity you may contact:

Jim Mosner, District Coordinator at: 612-812-0831; or by email at: taxaidejim@gmail.com



Deadline for volunteer application: November 30, 2022

QUESTIONS?

For more information contact the
URVC Office at urvc@umn.edu or
612-625-8016