

LADDER UP

Drop-Off and Exit Interviewer Associate Position Description

Organizational Overview:

Ladder Up is an entrepreneurial, Chicago-based nonprofit dedicated to providing free financial services to hardworking low-income families and individuals. Through free tax return preparation, college financial aid application assistance, financial education, and legal representation. Ladder Up helps its clients access the resources they need to move up the economic ladder. The organization offers three free programs to Chicago-area clients:

- Tax Assistance Program (TAP): By training and deploying 1,000+ volunteers, Ladder Up offers free tax return preparation at more than 25 Chicagoland tax sites
- Financial Capability and Financial Aid Program: Ladder Up helps low-income, minority, and first-generation students access financial aid for higher education
- Financial education: Ladder Up provides one-on-one financial coaching to individuals and on-site financial education workshops for partner organizations
- Tax Clinic: Ladder Up offers free legal representation to low-income taxpayers facing tax controversies

Position Description and Responsibilities:

Ladder Up seeks highly organized and self-motivated individual to serve in the role of part-time Drop-off Specialist and Exit Interviewer through the end of the 2021 filing season. This person will be an in-person seasonal position and will require IRS Certification, however tax knowledge is not required as training will be available. The Drop-off Specialist will be responsible for providing customer service support for in-person clients at the intake, case review, and exit interview steps of the process. Fluency in Spanish is preferred for this position. This position is set to start at our Ladder Up Headquarters but may be relocated to another site within the Chicagoland area. This individual will have the following primary responsibilities and will provide additional support as needed:

Drop-Off Specialist and Customer Support (60%)

As a Drop-Off specialist/exit interviewer you will have to be able to switch between both roles accordingly at the tax site.

- Sit with clients at a scheduled time to conduct an in-depth review of each client's documents and tax situation.
- Confirm that the client's tax situation is in scope for Ladder Up.
- Speak one-on-one with each client to review the client's answers to the modified intake forms are correct, ask follow up questions and record client answers in the client notes file.
- Help the client determine their filing status, if a dependent can be included on the client's return, or if the client should file as the dependent of another taxpayer.
- Scan all documents into our data base
- Begin an online profile for the client with all their contact information.

LADDER UP

Exit Interviewer (40%)

- Review client paperwork to ensure that all documents have been filled out by clients and that the tax return reflects the information shared by the clients
- Speak to clients on a one-on-one basis about their tax return
- Promptly and accurately explain the client's income tax return and answer any questions they may have.
- Make updates to the tax return if there are any mistakes
- Print out tax return for the client and provide client with an exit envelope and Ladder Up's contact information.

Position Qualifications:

- Fluent in Spanish, preferred
- Customer service experience
- Ability to communicate effectively and respectfully with diverse populations
- Flexibility and adaptability
- High level of motivation and interest in learning new skills
- Proficiency in Microsoft Office applications
- High level of organization and attention to detail
- Ability to effectively acknowledge and address client complaints and issues
- Quick learner who can work well in new situations or under pressure
- Learn to use Ladder Up's tax software (TaxSlayer) and review client tax returns as needed
- Complete IRS VITA certification at the Advanced Level

This is a part-time seasonal position, exempt position that is anticipated to begin January 25 and end April 15, 2021, at the end of the 2021 filing season and is contingent on passing the certification exam.

To Apply

Interested candidates should send a resume and cover letter to:

Lupe Marin
TAP Engagement Manager
lmarin@goladderup.org

For more information about Ladder Up, please visit www.goladderup.org.