

# LADDER UP

## **Information for E-File Associates** **FY 2020-2021**

### **Organizational Background**

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 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 tax sites
- Financial Capability
  - Financial aid: 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

### **E-file Associate Seasonal Position (March 2021 – April 2021)**

Position Description:

Ladder Up is looking for a highly organized and self-motivated individual to serve as a seasonal electronic filing associate for the Tax Assistance Program (TAP) from mid-January to the end of April. Electronic filing (e-filing) is an essential aspect of our Tax Assistance Program, as our clients depend on this service to receive their tax refunds. E-filing takes place five days a week and responsibilities include:

- Review client returns for common e-file transmission and rejection errors and resolve
- Call clients to follow up on issues relating to their returns
- Create spreadsheets with large numbers of figures and data without mistakes
- Verify data by comparing it to source documents
- Perform regular backups to ensure data preservation
- Protect and maintain confidentiality of client information

Qualifications:

- Accounting experience a plus, tax experience a plus
- Customer service experience
- Excellent oral and written communication skills
- Ability to communicate effectively and respectfully with diverse populations
- Flexibility and adaptability

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- High level of motivation and interest in learning new skills
- Proficiency in Microsoft Office applications
- High level of organization and great attention to detail
- Ability to follow up on client complaints and issues
- Quick learner that can work well in new situations or under pressure

This seasonal position is active from January through the end of April (between 35-40 hours each week). The role is based out of the Ladder Up main office in River North. The starting rate is \$17/hour, depending on experience, and requires a background check.

As part of the hiring and on-boarding process, all successful candidates must complete the online training modules and pass the IRS Volunteer Income Tax Assistance (VITA) certification at the Advanced Level.

### **To Apply**

Interested candidates for the 2021 tax season (March 2021 - April 2021) should send a resume to:

Greg Williams  
Operations Manager  
[Gwilliams@goladderup.org](mailto:Gwilliams@goladderup.org)

Or

Becky Santiago  
Engagement Senior Manager  
[Bsantiago@goladderup.org](mailto:Bsantiago@goladderup.org)

For more information about Ladder Up, please visit [www.goladderup.org](http://www.goladderup.org)