

LADDER UP

Tax Assistance Program - Quality Reviewer **FY 2023-2024**

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 to thousands of clients at multiple 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

Quality Reviewer Seasonal Position (January 2024- April 2024)

Position Description and Responsibilities:

Quality Reviewers play a vital role in working with Tax Assistance Program (TAP) clients to ensure that their individual income tax returns are prepared accurately. Quality Reviewers check a client's tax return in detail after it has been prepared by a volunteer tax preparer. Quality Reviewers also ensure that the client's confidential data and paperwork are properly stored and marked appropriately for record keeping and e-file (if applicable). Quality Reviewers will often be required to step into the role of Client Case Reviewer (to assist with the initial in-depth screening and analysis of a client's tax situation) and/or Tax Preparer (to prepare the tax return). Ladder Up is looking for friendly, professional, and detail-oriented individuals who will provide clients with a high-quality tax preparation experience.

Tax Preparation and Review (70%)

- Promptly and accurately complete and/or review client returns while at a tax site
- 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 client
- Support the skill building of peer tax preparers and volunteers by providing constructive feedback during the review process
- Always treat clients professionally, with courtesy and respect

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Tax Site Operations (30%)

- Assist with the set up and break down of the site materials as needed
- At request of the Site Leader, assist in any of the open tax site volunteer roles including Client Case Reviewer, Tax Preparer, and/or Quality Reviewer
- Comply with IRS Quality Site Requirements
- Protect and maintain confidentiality of client information
- Ensure adherence to the standards of conduct outlined by the IRS in Form 13615, Volunteer Agreement, by all site staff and volunteers and the guidelines set forth in the Ladder Up Volunteer Handbook

Position Qualifications:

- Excellent leadership and customer service skills
- Enthusiastic and positive attitude
- Highly organized, detail-oriented, and flexible in a dynamic environment
- Open to working at multiple tax sites
- Background in taxes or VITA experience is not required but considered a plus
- Experience preparing income tax returns and/or using tax software preferred, but not required
 - o Training will be provided by Ladder Up

This seasonal position is active from January 2024 through the end of the filing season (typically on or around April 15). Ladder Up tax sites are located all over the greater Chicago-land area, and can be viewed on the Ladder Up website (www.goladderup.org/locations).

Available shifts will vary based on the tax sessions calendar and the candidate's willingness to travel to open tax sites. As part of the hiring and on-boarding process, all successful candidates must complete all IRS Volunteer Income Tax Assistance (VITA) certification at the Advanced Level.

Note: Prior tax preparation experience is not required – study materials and other resources are provided. The starting pay rate is commensurate with experience.

To Apply

Interested candidates for the 2024 tax season (January 2024 – April 2024) should send a resume and cover letter, preferably before January 15, 2024 to:

Tax Assistance Program
info@goladderup.org

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