

# LADDER UP

## **Tax Filing Associate**

### **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 800+ volunteers, Ladder Up offers free tax return preparation at multiple tax sites.
- Financial Capability
  - Financial aid: Ladder Up helps low-income families access financial aid for higher education.
  - Financial education: Ladder Up provides 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 (December 2023 – April 2024)**

Ladder Up is looking for a highly organized and self-motivated Spanish-speaking individual to serve as a e-file associate. This individual will have the following primary responsibilities but not limited:

#### **Duties include, but are not limited to, the following:**

- a. Review client returns for common e-file transmission and rejection errors and resolve in a timely manner. (Training Offered)
- b. Create paper file packets as needed for rejected returns.
- c. Manage all aspects of client interaction for tax filing workstream.
- d. Addresses escalations and works to resolve issues and prevent further escalation.
- e. Responsible for overall client delivery and satisfaction in Tax Filing.
- f. Work with the Customer Service Associates to answer all incoming client calls, respond to client and volunteer inquiries, or direct calls to other staff members as needed.
- g. Provides reports to Data Manager.
- h. Follow-up with clients on tax return issues and missing information.
- i. Learn to use Ladder Up's tax software (TaxSlayer).
- j. Complete IRS VITA certification.
- k. Provide general support to other office staff as needed.

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### **Qualifications:**

- Fluent in Spanish, other languages are a plus
- Tax experience a plus, but not necessary
- 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 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 December 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 \$20-22/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.

### **To Apply by November 20, 2023**

Interested candidates for the 2023 tax season (December 2024 – April 2024) should send a resume to:

Lina Negret  
[lnegret@goladderup.org](mailto:lnegret@goladderup.org)

Or

Ashley Sosa  
[asosa@goladderup.org](mailto:asosa@goladderup.org)

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