

LADDER UP

Bilingual Program Support & E-File Associate

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 throughout the Chicagoland area.
- Financial Capability Program
 - Financial aid: Ladder Up helps low-income, minority, and first-generation students access financial aid for higher education
 - Financial education: Ladder Up provides 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 (January - April)

Ladder Up seeks a highly organized and self-motivated individual to serve as a seasonal electronic filing (e-file) associate. This is an in-office full-time position and has the following primary responsibilities:

E-File Program (75%)

- Review client returns for common e-file transmission and rejection errors and resolve in a timely manner
- Communicate with clients regarding error transmission on their returns (calls/emails)
- Continuously answer phones and check hotlines
- Create paper file packets as needed for rejected returns
- Create, verify, and update shared data spreadsheets (proficient in Excel)
- Assist with migrating data on a weekly basis
- Protect and maintain confidentiality of client information
- Learn to use tax software to prepare and review client tax returns as needed (training available)
- Complete IRS VITA Certification test (training available)
- Administrative support to Tax Assistance Program (TAP) and other programs as needed
- Support tax sites as needed and available most Saturday mornings

Program Support (25%)

- Attend outreach events and workshops
- Assist with training set-up and training

LADDER UP

Bilingual Program Support & E-File Associate

- Assist with technological aspects of preparation for tax season (storage facility)
- Assist with answering client calls related to all programs, responding to requests or directing calls as needed
- Provide support to other Ladder Up departments and programs as needed

Position Qualifications

- Excellent customer service experience
- Excellent oral and written communication skills
- 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 (excel focus)
- 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
- Tax experience (filing and e-filing) is a plus, but not necessary
- Fluent in Spanish and other languages is a plus

This seasonal position is active from January through the end of April (between 35-40 hours each week), with some exceptions beginning earlier in the season. The role is based out of the Ladder Up main office in River North – Downtown Chicago. The starting rate is \$21-23/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.

If interested, please send your resume to:

Karina Ruiz
kruiz@goladderup.org

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