



VOLUNTEER POSITION DESCRIPTION Ohio Benefit Bank Tax Counselor

SUMMARY: An Ohio Benefit Bank Tax Counselor assists clients in preparing their income taxes at no charge.

THE SYSTEM: The Ohio Benefit Bank is a web-based, easy to navigate question and answer software. You do not have to be an expert in tax preparation or the IRS tax codes. The expertise is built into the software.

RESPONSIBILITIES: An Ohio Benefit Bank Tax Counselor will assist clients in preparing their income tax returns and assist them in e-filing for refunds in as few as 7 days. This may be accomplished through:

- One-on-one sessions (OBB Tax Counselor and Client)
- Community Tax Clinic with more than one Counselor serving clients at the same location
- Local Ohio Benefit Bank Site housed in a partner non-profit agency. (OBB Tax Counselor working with client(s) at an existing OBB site).
- Helping Ohio citizens claim tax credits that they are eligible for, but have neglected to claim. 185,000 Ohioans are eligible for Earned Income Tax Credit (EITC) averaging \$1,720 per year, and do not receive them.
- Increasing revenue for our local community, in addition to helping those in need. Help clients receive their total refund, instead of paying a tax service and spending money on refund anticipation loans. \$83,000 in Federal and State refunds were brought back into our communities last year utilizing the Ohio Benefit Bank.

SKILLS/REQUIREMENTS:

- Desire to help families and neighbors in our community file their taxes for free
- Sensitivity to a diverse population
- Basic computer skills and familiarity with using a mouse and the internet
- Attend a one-day training for (approximately 5 hours) on the Ohio Benefit Bank – Tax Counselor

