Volunteer Opportunities

Money Mentors
Saturday March 7th, 2009
The Money Conference for State Employees
Framingham State College,Framingham, MA
8 am - 2 pm, Money Mentors needed 12 -2

Saturday April 25th, 2009
The Money Conference: Rebounding from the Recession
Western New England College,Springfield, MA
8 am - 3:30 pm, Money Mentors needed 12 -3:30

Email admin@fpama.org

Financial Coach: You are called to volunteer for a very unique and worthwhile volunteer opportunity! In a collaboration with the Dana-Farber Cancer Institute, volunteers will provide pro bono education or financial planning to patients and/or their immediate family caregivers who could not otherwise afford a planner. Some of the primary areas of concern for cancer patients and their families include debt, health insurance, government benefits, estate planning, and budgeting.

Participation in this program requires that all pro bono planners attend a full-day training session, sponsored by FPAMA and the Dana-Farber Cancer Institute.

Important Military Pro Bono Opportunity Available!

The FPA, on both the national and Massachusetts level, is proud to announce their involvement in assisting families affected by US military efforts overseas. The FPA is providing services to families who have questions on mortgages, credit, investments, budgeting, planning, wills, etc.

The FPA of Massachusetts represents approximately 1,200 members and would like to fairly represent our Chapter in this very important role. The families are in dire need of our guidance. While there is no cost or to you, this represents an excellent opportunity to give back to our soldiers, their families and to our country for their extraordinary efforts. We believe you will find the experience to be extremely rewarding.

Involvement can be in one of two ways:

- be available and respond to emails from the families (approximately one every 2-3 weeks at the current rate of inquiries) or,
- be available to work with families in person, one-on-one (less frequent; approximately once every 3-4 months)

If you are interested in either of the two possibilities stated above and a CFP® in good standing, please email admin@fpama.org with your name and involvement wishes. You will be notified by the FPA before any further involvement.

FPA National Seeks Volunteers for E-mail Hotline

FPA recently reactivated its "Ask a Planner" e-mail hotline on its consumer Web site. As youmay recall, this service was unavailable to the public for several months. FPA's e-mail hotline allows individuals to submit general financial planning questions and receive answers by FPA members who are CFP® professionals. Due to increased consumer participation, FPA is seeking volunteers to provide unbiased, objective advice to individuals via this service. FPA e-mail hotline volunteers are required to answer questions within 24 hours. In addition, volunteers' answers may be used in whole or part for inclusion on FPA's Web site feature, "Question of the Week." Volunteer answers will be fully attributed on the consumer Web site if selected for the "Question of the Week" feature.If you would like to volunteer for this service, please contact your dedicated FPA Member Services Advocates at 800.322.4237, ext. 2.

VOLUNTEER TAX COUNSELOR
Quincy Community Action Programs

CONTACT
Name: Martha Rogers
Address: 1509 Hancock Street, Quincy MA 02169
Phone: 617-479-8181 x 304
Fax: 617-479-7228
Email: mrogers@qcap.org
Website: www.qcap.org
LOCATION QCAP's Learning Links Technology Center, 1511 Hancock Street, Quincy, MA 02169. Accessible by MBTA Red Line, Quincy Center stop.

POSITION DESCRIPTION
QCAP seeks volunteer tax counselors to help low income households prepare their federal and state income tax returns, using an-online tax preparation software. A goal is to help low income people claim tax credits for which they may be eligible. Volunteer counselors provide the assistance in accordance with IRS guidelines, and applicable QCAP policies.

VOLUNTEER TAX COUNSELOR RESPONSIBILITIES

- Become IRS Certified in tax law by completing the on-line Link and Learn Taxes course. Course may be accessed from IRS website www.irs.gov (type Link and Learn Taxes in search box). Intermediate module and certification test must be completed for

Volunteers who wish to work with seniors. Total time to complete training for the first time is about 20 hours. Test takes about 1-2 hours to complete

- Print Basic and Intermediate (if applicable) test certificates with score and give to QCAP VITA Coordinator.
- Complete on-line Volunteer Agreement Form, and print copy for QCAP VITA Coordinator. Submit completed form electronically to the IRS.
- Participate in a volunteer orientation at QCAP that includes training on using the tax preparation software (estimated 4 hours).
- Provide high quality tax assistance to all customers. Directly prepare customer's returns based on information provided by customer or answer tax related questions.
- Interview customer to determine if all income, deductions and allowable credits are claimed.
- Prepare only those tax returns for which training and certification were provided.

- Refer customers with complex returns to the IRS web site or help number, or to a tax practitioner or firm.
- Complete quality reviews of fellow volunteer tax returns.
- Maintain confidentiality of customer information.
- Ensure a copy of completed return (s) is provided to customer.
- Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin, or disability.

Volunteers cannot accept pay or compensation for assistance provided. Volunteers cannot refer customers to any one particular tax practitioner or firm. QCAP maintains a list of area tax practioners for customer referral purposes.

<u>QUALIFICATIONS</u>

1. Ability to learn and apply basic tax knowledge. Training will be provided.
2. Basic computer skills for inputting tax return information.
3. Pride in performing tasks completely and accurately.
4. Strong interpersonal skills and desire to help people.
5. Ability to maintain taxpayer confidentiality.
6. Ability to work well with diverse populations.
7. Dependability and flexibility.

TIME COMMITMENT

Prior to the start of tax season, volunteers successfully complete the IRS's web-based tax law training and certification program Link and Learn (about 20 hours for new volunteers), and participate in a 4 hour orientation that includes software training.

During the tax season (January 31 through April 11) tax counseling will take place on Thursday evenings and Saturdays. Volunteers should commit 2-4 hours weekly for the duration of the tax season. However, the minimum commitment is 8 hours monthly.

SUPERVISION AND VOLUNTEER LIABILITY

Volunteers will be supervised while on site by an experienced VITA Coordinator. The Coordinator will be available to provide support, guidance, and answer questions. In addition, the Site Coordinator will make sure a quality check of all tax returns is completed, and prepare tax returns for electronic filing.

Volunteers are covered under the Volunteer Protection Action of 1997, which can be found in its entirety at www.irs.gov/individuals. "As long as the volunteer acts within the scope of the Volunteer Return Preparation Program, and has been certified by the IRS as a Volunteer Tax Counselor, they shall not be held liable for any harm caused by an act or omission on their part."