



# Volunteer Training

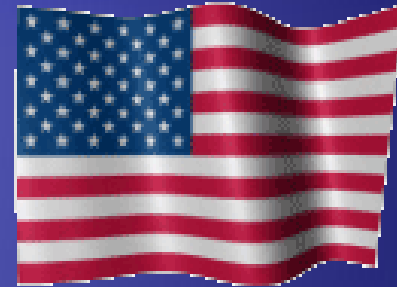
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[Tax-Aid.org](http://Tax-Aid.org)

# Tax-Aid Training Details

◆ Overview



◆ Ethics



◆ What to expect



# TAX-AID

- ◆ You make a difference!
- ◆ Various volunteer opportunities
  - ◆ Financial Coaching
  - ◆ Other opportunities

# Ethics and the Volunteer Protection Act of 1997

- ◆ Volunteers are protected as long as they act within scope and prepare the return to the best of their knowledge
- ◆ Client confirms information is accurate

# Your Role as Volunteer

- ◆ Your Responsibilities
  - ◆ Do not refer clients to personal business contacts
  - ◆ Do not solicit business or share your business cards
- ◆ Confidentiality
  - ◆ Client information is sensitive
  - ◆ Return extra tax documents and Social Security cards to the client
  - ◆ Do not discuss client information outside the tax site
- ◆ Conflict of Interest
  - ◆ Free service
  - ◆ Do not accept gifts

# Volunteers

- ◆ What to Expect
  - ◆ Volunteer at least three sessions
  - ◆ Confirm attendance with your Site Manager
  - ◆ Arrive early
  - ◆ Be ready to learn a lot and have fun