AARP Foundation Tax-Aide Position Description: **Client Facilitator**

PROGRAM
AARP Foundation Tax-Aide provides free personal income tax counseling and tax preparation to middle- and low-income taxpayers, with special attention to those age 50 and older.

POSITION SUMMARY
The Client Facilitator(CF) works with the Local Coordinator/Shift Coordinator, performs check-in duties, provides an important first contact to the AARP Foundation Tax-Aide program for taxpayers and manages taxpayers' initial activities.

RESPONSIBILITIES OF POSITION

- Welcome taxpayers and ensure they are helped in an appropriate order by a Counselor
- Ensure that taxpayers have correct forms, documents, and personal identification required to accurately complete their tax return
- Assist taxpayers in filling out portions of the Intake Booklet. The Client Facilitator may not address tax questions (unless also certified as a Counselor)
- Review the taxpayer's Intake Booklet and alert the LC/SCO when a taxpayer's return may be outside of AARP Foundation Tax-Aide scope
- Assist Counselors and the LC in maintaining an orderly file system of incoming and returning taxpayers and their status
- Distribute any appropriate literature to taxpayers
- May help make or confirm appointments

SKILLS & TRAITS

- Conflict resolution skills
- Ability to keep strict confidentiality
- Strong communication skills
- Team building skills
- Ability to work with others
- Dedication and commitment to Tax-Aide and its mission
- Ability to respect and work with others without bias
- Service oriented mind set
- Strong people skills

TERM OF SERVICE AND ELIGIBILITY
The CF is appointed for a one-year term, contingent upon satisfactory annual review, and may be reappointed for subsequent one-year terms. Client Facilitators are eligible for other AARP or AARP Foundation volunteer positions.

TIME, TRAINING, AND TRAVEL REQUIRED
Time commitment varies according to geographic area and number of volunteers. The position usually requires more time from January to May. The CF must acquire the knowledge of all procedures associated with the program, and attend district meetings as directed by the LC. CFs must annually re-familiarize themselves with the "Policies and Procedures" training, pass the IRS Standards of Conduct and Intake/Quality Review tests and sign the IRS Volunteer Standards of Conduct (Form 13615). CFs travel locally to sites.

APPOINTMENT, SUPERVISION, AND SCOPE OF AUTHORITY
The CF is appointed by the Local Coordinator with concurrence of the District Coordinator and reports directly to the Local Coordinator.

AVAILABLE RESOURCES: This position description is a high-level overview and is designed to be used in conjunction with the Client Facilitator Guide located in the Portal Libraries > Tax-Aide: Position Information . The CF will be afforded the necessary guidance, training and materials needed to fulfill their responsibilities with support from the Local Coordinator and other district/state level leaders, National Office, and IRS.