

Boston Tax Help Coalition
Lead Financial Guide Internship (Stipend Available)
Duties and Responsibilities Description
Spring 2020

Mission of Organization:

The mission of the Boston Earned Income Tax Credit Coalition is to broaden pathways from poverty to financial empowerment by maximizing the impact of the earned income and other tax credits through quality, free tax preparation, financial education and economic stability opportunities.

Project Description:

The Lead Financial Guide will manage the site operation of the Financial Check-up Program at an assigned tax preparation site. The Lead Financial Guide is responsible for the overall flow and structure of the Program with support from the Asset Building Program Coordinator and Tax Site Coordinator. The main focus of the Lead Financial Guide is to pull credit reports that will be assessed by the trained volunteer Guides. S/he must also resolve any issues that may arise on a daily basis pertaining to taxpayers and volunteers. The Lead Financial Guide must promote the values and mission of the Coalition.

Specific Responsibilities:

- Manage Financial Guide volunteers; including, being a resource, assign tasks, provide scheduling assistance.
- Operate credit report requests processing independently and responsibly;
- Ensure the return and secure storage the credit reports
- Effectively answer questions and concerns from current and potential participants;
- Communicate with and provide feedback to the Asset Building Program Coordinator, Tax Site Coordinator, and the Coalition Director;
- Maintains quality service by enforcing VITA volunteer standards; analyzing and resolving quality and customer service problems; identifying trends; recommending system improvements.
- Ensure proper supply of paperwork (Financial Check-up Packets) and office supplies
- Conduct record keeping as appropriate;
- Attend and contribute to the tax preparation site meetings, if necessary;
- Complete the Coalition's Guide training

Qualifications:

- Willingness to work some nights and weekends; minimum of 15 hours per week
- An interest and desire to work in the fields of finance, business, management, and/or community services.
- Strong communication skills
- Ability to manage priorities, attention to detail and problem solving skills
- Bilingual in Spanish, Haitian Creole, Vietnamese, or Portuguese is a plus, but not required

Time Frame:

- January-April 2020, 15 hours a week at an assigned tax site (please see list of tax sites and hours on back).
- The online and classroom training is mandatory and is offered in December, and early January

Please send your resume to sayyida.jean-charles@boston.gov

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