



VOLUNTEER ROADMAP

GETTING STARTED WITH MONTCOVITA

CONTACT & SETUP ☒

Contact MontcoVITA at 215-854-9440 or info@montcovita.org to introduce yourself and inquire about volunteering to help to prepare FREE tax returns for your neighbors!

CHOOSE YOUR CERTIFICATIONS ☒

Minimum certifications required (3):

- ☒ Basic tax certification
- ☒ Volunteer standards of conduct
- ☒ Intake/Interview & Quality Review

Optional: Advanced certifications and other specialty certifications are also available!

TAX TRAINING ☒

Sign up for the IRS Link and Learn training platform at linklearncertification.com where you will learn how to prepare a tax return and obtain your certifications!

START PREPARING TAX RETURNS! ☒

After a brief orientation, you will be assigned returns by our staff and then those returns will be reviewed by our experienced CPAs and Enrolled Agents and other tax professionals for accuracy.

You will get regular feedback sessions which will hopefully begin to shape your professional career!