



Community Resource Navigator Volunteer

The nonprofit CASH (Creating Assets, Savings & Hope) Campaign of Maryland works to increase the financial security of low-income individuals and families by providing direct services and leading a coalition of partners.

The Community Resource Navigator (CRN) connects individuals and families to valuable resources and information that help them increase their financial stability. Volunteers will be trained to work one-on-one with tax clients to provide resources on financial products and saving tools at tax sites across Baltimore City. The CRN helps clients complete initial paperwork, listens to the financial challenges, and goals of clients, and then connects them with services offered by CASH and its partners such as safe bank accounts, appointments for benefits screening, and referrals to legal or financial coaching services. The CRN provides support at each tax site to ensure that the sites run smoothly and efficiently.

Duties:

- Meet individually with clients at one of CASH's tax sites in Baltimore City and Baltimore County.
- Welcome clients to tax site and assist with the intake process.
- Listen to the needs of clients and offer pertinent information about available financial resources and services.
- Connect clients to financial products and services (e.g., credit counseling, legal assistance).
- Promote and help complete appointment registration for free and confidential public benefits screening.
- Promote enrollment in safe and affordable financial products and support clients in saving part of their tax refunds.
- Help tax volunteers and managers answer client questions about financial opportunities.

Qualifications:

- Interest in CASH mission to help low- and moderate-income families save at tax time.
- Enthusiasm and ability to build rapport with a diverse range of individuals. Good listening skills and an ability to adapt the message of asset building to a variety of stakeholders- volunteers, social service providers and clients.
- **No prior financial or tax experience required.**

Time Commitment & Training:

- Tax sites need CRN support during the week Tuesday – Friday in the afternoons and on Saturday between late January and mid-April.
- CASH is flexible with scheduling volunteer hours, but we suggest 5 shifts throughout tax season of 3-4 hours each.
- CRNs must successfully complete a 2-hour virtual training to learn about CASH's services, the process for making referrals, and how to work at our tax sites.
- CRN's must also take and pass the IRS ethics test.

To learn more or to register for training please contact Jemma Harris, Program Associate, at Jemma@cashmd.org.