

**Community Volunteer Income Tax Program
Client Intake Form – Tax Year 2020**



Social Insurance Number:		
First Name:	Last Name:	
Address:		
City:	Province:	Postal Code:
Date of Birth (Day/Month/Year):	Phone Number:	
Best day(s) of the week and time(s) to reach you if the volunteer has questions:		
Notes for the volunteer about your documents/return:		

Please answer all of the following questions.

<p>Marital Status as of December 31, 2020 (circle one): Married Common-law Widowed Divorced Separated Single Did your marital status change between January 1 and December 31, 2020 (circle one)? Yes No If yes, date of change (day/month/year): _____</p>
<p>Did you sell a principal residence in the year (circle one)? Yes No</p>
<p>Did you live in BC on December 31, 2020 (circle one)? Yes No If no, province lived in: _____</p>
<p>Did you enter Canada or leave Canada in 2020 (circle one)? Yes No If yes, date of entry (day/month/year): _____ Or date of departure (day/month/year): _____</p>
<p>Are you a Canadian citizen (circle one)? Yes No</p>
<p>May we provide your name, address and date of birth to Elections Canada to update the voting list (circle one)? Yes No</p>

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<p>For this tax year, did you own foreign property with a total cost of more than \$100,000 Canadian (circle one)? Yes No</p>	
<p>Do you have a Disability Tax Credit (approved by Canada Revenue Agency with appropriate documentation) (circle one)? Yes No</p>	
<p>Are you registered for Direct Deposit with Canada Revenue Agency (circle one)? Yes No</p> <p>If no, would you like to register for it? Yes No</p>	
<p>Would you like your tax return to be electronically filed (circle one)? This must be answered “Yes” to access this service. Yes No</p>	
<p>I am aware that the tax return is prepared by volunteers and they are not CRA agents. This must be answered “Yes” to access this service. Yes No</p>	
<p>I am aware that if the volunteer contacts me by phone or email that these are not secured methods of communication. Yes No</p>	
<p>I consent for autofill my return. I understand that I grant access only for restricted view, no change ability and time-limited to end of tax-filing day to my CRA info by an authorized volunteer. This is helpful but not required for the volunteer to file your return. Yes No</p>	
<p>Signature:</p>	<p>Date:</p>

WESN STAFF/VOLUNTEER USE ONLY	
<p>Client has shown you 1 piece of government-issued ID or you can confirm their identity. Yes No</p>	
<p>All tax documents (T-slips) and this intake form are placed in an envelope or clipped in a folder labelled with the client’s first and last names. Yes No</p>	
<p>Client informed their documents are ready for pick-up. Yes No</p>	
<p>TIS60 signed by client. Yes No</p>	
<p>Signed TIS60 copied for Kaitlin. Original signed copy given to client. Yes No</p>	
<p>Volunteer informed that client signed their TIS60. Yes No</p>	
<p>Intake form given to Kaitlin and filed away. Yes No</p>	