

**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.

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): _____
Did you sell a principal residence in the year (circle one)? Yes No
Did you live in BC on December 31, 2020 (circle one)? Yes No If no, province lived in: _____
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): _____
Are you a Canadian citizen (circle one)? Yes No
May we provide your name, address and date of birth to Elections Canada to update the voting list (circle one)? Yes No

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For this tax year, did you own foreign property with a total cost of more than \$100,000 Canadian (circle one)? Yes No	
Do you have a Disability Tax Credit (approved by Canada Revenue Agency with appropriate documentation) (circle one)? Yes No	
Are you registered for Direct Deposit with Canada Revenue Agency (circle one)? Yes No If no, would you like to register for it? Yes No	
Would you like your tax return to be electronically filed (circle one)? This must be answered “Yes” to access this service. Yes No	
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	
I am aware that if the volunteer contacts me by phone or email that these are not secured methods of communication. Yes No	
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	
Signature:	Date:

WESN STAFF/VOLUNTEER USE ONLY
Client has shown you 1 piece of government-issued ID or you can confirm their identity. Yes No
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
Client informed their documents are ready for pick-up. Yes No
TIS60 signed by client. Yes No
Signed TIS60 copied for Kaitlin. Original signed copy given to client. Yes No
Volunteer informed that client signed their TIS60. Yes No
Intake form given to Kaitlin and filed away. Yes No