

Complete all sections legibly and as filed with Canada Revenue Agency (CRA)

First Name:		Last Name:	
Address:			
City:		Province:	Postal Code:
Date of Birth (DD/MMM/YYYY):		Phone Number:	
<p>Do you meet the tax clinic eligibility criteria for modest income and simple tax situation (see below)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Family size and total family income is under: 1 person – \$35,000 3 persons – \$47,500 2 persons – \$45,000 4 persons – \$50,000</p> <p>Simple tax situation: Your tax situation is simple if you have no income or if your income comes from any of these sources:</p> <ul style="list-style-type: none"> • Employment, pension, or support payments • Benefits such as Canada Pension Plan (CPP), disability insurance, employment insurance, and social assistance • Registered retirement savings plans (RRSPs) • Scholarships, fellowships, bursaries, or grants • Interest under \$1,000 <p>Your tax situation is not simple if you:</p> <ul style="list-style-type: none"> • Are self-employed or have employment expenses (exceptions apply) • Have business income and expenses • Have rental income and expenses • Have interest income over \$1,000 • Have capital gains or losses • Filed for bankruptcy in the tax year (or the year before, if that return has not yet been filed) • Are completing a tax return for a deceased person • Have foreign income or property (T1135) 			

Answer all the following questions

<p>Do you have your 2020 Notice of Assessment with you?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Do you have all your 2021 tax slips (for example T4, T5)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Marital status as of December 31, 2021 (select one):</p> <p><input type="checkbox"/> Married <input type="checkbox"/> Common-law <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Single</p>
<p>Did your marital status change between January 1 and December 31, 2021? (select one)</p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes, date of change (DD/MMM/YYYY): _____</p>
<p>Did you sell a principal residence in the year (select one)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Did you live in BC on December 31, 2021 (select one)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No, province lived in: _____</p>
<p>Did you enter Canada or leave Canada in 2021 (select one)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, date of entry (DD/MMM/YYYY): _____</p> <p>Or date of departure (DD/MMM/YYYY): _____</p>
<p>Are you a Canadian citizen (select one)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>May we provide your name, address, and date of birth to Elections Canada to update the voting list (select one)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>For this tax year, did you own foreign property with a total cost of more than \$100,000 Canadian (select one)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Do you have a Disability Tax Credit (approved by CRA with appropriate documentation) (select one)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>



Are you registered for Direct Deposit with CRA (select one)?
 Yes No – If no, would you like to register for it? Yes No

Read the following statements and agree to all for access to this service

I understand that income tax returns are filed electronically and agree to this process.	<input type="checkbox"/> Yes
I am aware that the tax return is prepared by volunteers , and they are not CRA agents nor accountants or bookkeepers.	<input type="checkbox"/> Yes
I am aware that if a volunteer contacts me by phone or email that these are not secured methods of communication .	<input type="checkbox"/> Yes
I consent to autofill my return to check for missing information. I understand that I grant access to my CRA information by an authorized volunteer only for the restricted view, no changeability, and time-limited to the end of filing day.	<input type="checkbox"/> Yes
I understand that WESN retains the right to refuse service for tax situations that do not meet eligibility criteria or for aggressive, abusive, and inappropriate behaviour and language towards staff or volunteers.	<input type="checkbox"/> Yes
I understand that if an adjustment to the tax return is needed that it is the responsibility of the client to contact CRA and to submit an adjustment form.	<input type="checkbox"/> Yes
I understand that CRA conducts their calculations and the balance owing or refund on the Notice of Assessment may be different than indicated from this service.	<input type="checkbox"/> Yes
Signature: 	Date (DD/MMM/YYYY):