

Community Volunteer Income Tax Program  
Client Intake Form – Tax Year 2022



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

<b>Legal First Name:</b>		<b>Legal Last Name:</b>	
<b>Address:</b>			
<b>City:</b>		<b>Province:</b>	<b>Postal Code:</b>
<b>Date of Birth (DD/MMM/YYYY):</b>		<b>Phone Number:</b>	

**Do you meet the tax clinic eligibility criteria for a simple tax situation? Refer to information in this table.**  
Yes  No

Family size and total family gross income is under:  
1 person – \$35,000      2 persons – \$45,000  
3 persons – \$47,500      4 persons – \$50,000

Your tax situation is simple if you have no income, or your income is from any of these sources:

- Employment, pension, or support payments
- Benefits such as Canada Pension Plan (CPP), disability insurance, employment insurance, and social assistance
- Registered retirement savings plan (RRSPs)
- Scholarships, fellowships, bursaries, or grants
- Interest under \$1,000
- You did NOT sell a principal residence
- You are NOT self-employed or have employment expenses (exceptions may apply)
- You do NOT have farming, commission, business or rental income and expenses
- You do NOT have capital gains or losses
- You have NOT filed for bankruptcy in the tax year
- You do NOT have foreign income and/or foreign pension or own foreign property (T1135)
- You are NOT completing a tax return for a deceased person

- Did you bring your 2021 Notice of Assessment or 2021 Tax return summary with you? Yes  No
- Did you bring all your 2022 tax slips (for example T4, T5)? Yes  No
- Marital status as of December 31, 2022:  
Married  Common-law  Widowed  Divorced  Separated  Single

Please continue on the other side .....

- Did your marital status change between January 1 and December 31, 2022? No  Yes

If yes, date of change (DD/MMM/YYYY): \_\_\_\_\_

- Did you sell a principal residence in 2022? Yes  No

- Did you live in BC on December 31, 2022? Yes  No

If no, province lived in: \_\_\_\_\_

- Did you become a resident of Canada in 2022? Yes  No

If yes, date of entry (MMM/YYYY): \_\_\_\_\_

- Did you cease to be a resident of Canada in 2022? Yes  No

If yes, date of departure (MMM/YYYY): \_\_\_\_\_

- Are you a Canadian citizen? Yes  No

- As a Canadian citizen, may we provide your name, address, and date of birth to Elections Canada to update the voting list? Yes  No

- Do you have a Disability Tax Credit (approved by CRA with correct documentation)? Yes  No

**Read the following statements and confirm your agreement by signing and dating the form below. You may only access this service by agreeing to all the statements**

- I understand that income tax returns are filed electronically and agree to this process.
- I am aware that the tax return is prepared by volunteers, and they are not CRA agents nor accountants or bookkeepers.
- I am aware that if a volunteer contacts me by phone or email that these are not secured methods of communication.
- 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.
- 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.
- 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 (1-800-959-8281).
- 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.

Signature: \_\_\_\_\_

Date (DD/MMM/YYYY): \_\_\_\_\_