

Community Volunteer Income Tax  
Program Client Intake Form –Year 2023



<b>Legal First Name:</b>		<b>Legal Last Name:</b>	
<b>Address:</b>			
<b>City:</b>	<b>Province:</b>	<b>Postal Code:</b>	<b>SIN:</b>
<b>Date of Birth:</b>	<b>Phone Number:</b>	<b>Email:</b>	

<p><b>Refer to information below to see if you meet the tax clinic eligibility criteria for a simple tax situation?</b></p> <p>Family size and total family gross income is under: 1 person – \$35,000    2 persons – \$45,000</p> <p>You do NOT have dependants other than a spouse</p> <hr/> <p>Your tax situation is simple if you have no income, or your income is from any of these sources:</p> <ul style="list-style-type: none"> <li>● Employment, pension, or support payments</li> <li>● Benefits such as Canada Pension Plan (CPP), disability</li> <li>● insurance, employment insurance, and social assistance</li> <li>● Registered retirement savings plan (RRSPs)</li> <li>● Scholarships, fellowships, bursaries, or grants</li> <li>● Interest under \$1,000</li> </ul>	<p style="text-align: center;"><b><u>OTHER DETAILS</u></b></p> <ul style="list-style-type: none"> <li>● You DID your taxes for the year 2022</li> <li>● You did NOT sell a principal residence</li> <li>● You are NOT self-employed or have employment expenses (exceptions may apply)</li> <li>● You do NOT have farming, commission, business or rental income and expenses</li> <li>● You do NOT have capital gains or losses</li> <li>● You have NOT filed for bankruptcy in the tax year</li> <li>● You do NOT have foreign income and/or foreign pension or own foreign property (T1135)</li> <li>● You are NOT completing a tax return for a deceased person</li> <li>● You did NOT become a resident of Canada in 2023</li> </ul>
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Did you bring your 2022 Notice of Assessment or 2022 Tax return summary with you?    Yes  No

Did you bring all your 2023 tax slips (for example T4, T5)?    Yes  No

Did you change your name in 2023?    Yes  No

Did you sell a principal residence in 2023?    Yes  No

Did you become a resident of Canada in 2023?    Yes  No

Did you live in BC on December 31, 2023?    Yes  No

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

PLEASE CONTINUE ON THE OTHER SIDE ...

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 voter list? Yes  No

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

Marital status as of December 31, 2023: Married  Widowed  Common-law   
Divorced  Separated  Single

Did your marital status change between January 1 and December 31, 2023? Yes  No

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

Were you a renter for 6 months or more in 2023? If so, how many months did you rent? \_\_\_\_\_ months

What was your monthly rate? (\$) \_\_\_\_\_

Provide the landlord's name or check payable to whom? \_\_\_\_\_

**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 behavior and language towards staff or volunteers
- I understand that if an adjustment to the tax return is needed, 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: \_\_\_\_\_