



T A X S E A S O N

Volunteer Income Tax Preparation Assistance

Income Eligibility Criteria

Personal tax preparation service is available at no charge to individuals of modest income:

Family size	Total family income	Family size	Total family income
1 person	\$35,000	4 persons	\$50,000
2 persons	\$45,000	5 persons	\$52,000
3 persons	\$47,500	More than 5 persons	\$52,500 plus \$2,500 for each additional person

Volunteers do not prepare complex returns, such as returns for individuals who:

- Have self-employment income
- Have business or rental income and expenses
- Have capital gains or losses
- Have employment expenses
- Have interest income greater than \$1,000
- File for bankruptcy
- Are deceased within the year

WHAT TO BRING TO THE TAX Clinic



1. Valid, government photo issued ID
2. A copy of completed 2020 Tax Return and **2020 Notice of Assessment** (if available)
3. Social Insurance Number for you and your spouse/common-law partner
4. List of dependants and birth dates (day, month, year). Social Insurance Number for each dependant (if available)
5. Details of spouse's income and dependant's income
6. Date of Marriage or Separation (new in 2021)
7. Details of any alimony and maintenance payments received or paid
8. If a new immigrant, date of arrival in Canada
9. If first time buyer, details of home purchase
10. If you sold a principal residence and have no capital gain because you are eligible for the full exemption, the following information on the sale is required: the year of acquisition, the sale price or amount you received for the property and the description/address of the property.
11. All receipts of income, for example:
 - Salary and wages **T4**
 - Statement of Pension, Retirement, Annuity and Other Income **T4A** (Scholarships, CERB, CESB, CRCB)
 - Old Age Security **T4A** (OAS)
 - Canada Pension Plan benefits **T4A(P)**
 - Employment Insurance benefits **T4E**
 - Registered Income Fund income **T4RIF**
 - Registered Retirement Savings Plan income **T4RSP**
 - Interest and Dividend payments **T5**
 - Statement of interest trust **T3**
 - Worker's Compensation/Social Assistance Payments **T5007**
 - Universal Child Care Benefit Statement **RC62**All receipts of expenses, for example:
 - Property taxes and/or details of total rent paid during the year and all addresses of places of residence during the year and name(s) of landlord
 - Child care expenses (plus caregiver's Social Insurance Number) - **including Form T778**
 - Medical expenses
 - Charitable and political donations
 - Child fitness, arts and other qualifying activity receipts
 - Public transit passes and receipts, and electronic payment cards
 - Union or professional dues
 - Tuition fees/education amount (**T2202/T2202A**)
 - Student loan interest
 - RRSP contributions
 - If this is the first year of a disability credit claim, or if the previous one had expired, a copy of the disability certificate Form **T2201**
 - For a person who is either a senior (65 or older) or eligible to claim the disability credit OR a family member living with them, include receipts for permanent home modifications that improve accessibility or help the person be more functional, mobile, reduce risk of harm or to gain access to the home.
 - Sale of your Residence that served as your personal residence - cost and selling price, summary of closing and legal expenses
 - Work at home expenses - if you worked remotely for at least 50% of the time for 4 consecutive weeks - please total the number of days you did this excluding holidays and sick days

DROP OFF CLINIC TIMES

DATE: _____

TIME: _____

LOCATION: _____

