

# Volunteer Income Tax Preparation Clinic

Immigrant Services is pleased to offer free income tax preparation to low-income individuals and families once again this year.

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

\* family size includes an individual, or a couple, and their dependants



## We cannot complete returns with the following:

- self-employment income or employment expenses (see exception below)
- business or rental income and expenses
- interest income over \$1,000
- capital gains or losses
- foreign property (T1135)
- bankrupt individuals in the year of bankruptcy (or the year prior, if that return has not been filed)
- deceased individuals

## Exception

Taxpayers who have T4A income that shows as self-employed/business in box 48 may be eligible to have their return completed under the CVITP. The volunteer must be comfortable preparing the return with the T4A income and **all** the following conditions must be met:

- total income in box 48 is under \$1,000
- no expenses are claimed
- taxpayer is not registered as a GST/HST registrant or required to be a GST/HST registrant

**ISGW clients** can book a tax appointment with a settlement counsellor. Appointments are available, Monday - Friday, 9:00am - 4:30pm during March and April.

**To book an appointment, call Liza 519-836-2222, ext. 240**

As in previous years, during March and April, we are also offering a tax clinic staffed by volunteers. The clinic is for members of the community who have a modest income and a simple tax situation.

**Clinic hours: Saturdays in March and April, 9:00am - 12:00pm**

To book an appointment with a volunteer, **call Liza at 519-836-2222, ext. 240**

**Clinic appointments will be conducted virtually. In-person appointments may be available based on an exceptional need.**

## Multi-language service:

We can help you in your own language. Let us know that you would like interpretation when you book your appointment.



# DOCUMENTS TO HAVE READY FOR YOUR TAX APPOINTMENT

Your tax return can only be completed properly if you provide all the necessary documentation with you to the clinic/volunteer. Family members of 18 years or older will be asked to show proof of ID and provide verbal consent to do their taxes.

The following list will help you prepare for having your return completed.

- **A copy of your 2021 Notice of Assessment.**
- **Social insurance number** of family members who are 18 years or older. Please provide date of birth of every family member including children.
- **Government Photo ID** (PR card, Driver's licence, Photo card, Passport)
- **\*New clients bring your immigration document to the appointment.**
  
- ❖ **Information Slips (Income slips)**  
(Note: Many slips are available through CRA 'My Account' or Service Canada 'My Account') if you could not access or have them our volunteers can help to get them.
  1. T4 - Salary and wages
  2. T4A, T5, T3 - Pension, annuity and investment income, Canada/Ontario savings bonds
  3. T4A(OAS) - Old age security/ Guaranteed income supplement or spouse's allowance
  4. T4A(P) - Canada Pension Plan
  5. T4RSP, T4RRIF - Registered retirement savings plan/Registered Retirement Income Fund income
  6. T4E - Employment insurance benefits
  7. T5007 - Social assistance payments/ Worker's compensation benefits
  8. RC62 - Universal Child Care Benefit
  9. 2021 T4A slips for COVID-19 related benefits (i.e. CERB)
  10. IF YOU RECEIVED A LUMP-SUM PAYMENT, bring the breakdown statement from the payer
  
- ❖ **Receipts for:**
  11. Charitable/political **Donations** (*Please make a list & add up all of the receipts to help the preparer*)
  12. Child care expenses receipts.
  13. Medical expenses/Dental expenses not covered by a health plan  
(*Please make a list & add up all of the receipts to help the preparer, or obtain a printout from your pharmacy*)
  14. Seniors: monthly public transit pass (*add up all of the receipts to help the preparer. Note: You can only claim monthly or longer duration*)
  15. **Rent total** or property tax statement (*Please make a list & add up all of the receipts to help the preparer*)
  16. Tuition fees and education amount (T2202A)
  17. Union dues
  18. RRSP... Register Retirement Saving Plan contribution receipt
  19. Home office expenses for employees (Calculate how many days you worked from home in 2021. We are only going to assist with the Temporary flat rate method where you can claim 2 dollars for each day you worked from home, a maximum \$500 in 2021).
  
- ❖ **Other**
  20. Details of spouse's and dependant's income
  21. Date of arrival to Canada and status (if a new immigrant)
  22. **Direct deposit information (5-digits of Branch #, 3-digits of Institute # and account # )**
  23. Any other documentation that may pertain to your income taxes