

**CLIENT INTAKE AGREEMENT - TAX YEAR \_\_\_\_\_**

**One form per year, per person, including couples`**

**CLIENT NAME: FIRST:** \_\_\_\_\_ **LAST:** \_\_\_\_\_

**ALSO KNOWN AS:** \_\_\_\_\_

**SIN** \_\_\_\_\_

**BIRTH DATE:** DD \_\_\_\_ MM \_\_\_\_ YYYY \_\_\_\_

**Province of Residence on Dec 31:** \_\_\_\_\_

**MARITAL STATUS:** \_\_\_\_\_ (S/M/W/D)

**Did marital status change this year? Yes**  **No**

**SPOUSE NAME:** \_\_\_\_\_

*If yes, when? DD \_\_\_\_ MM \_\_\_\_*

**SPOUSE SIN:** \_\_\_\_\_

*If yes, your prior last name: \_\_\_\_\_*

**Do you have dependant children? Yes**  **No**  *If yes, additional form required.*

**Is this your first time filing a Canadian Tax Return? Yes**  **No**

*Did you immigrate to Canada this year? Yes*  *No*  *Date of Arrival: DD \_\_\_\_ MM \_\_\_\_ YYYY \_\_\_\_*

***If any of the following are yes, we are unable to complete your return:***

**Do you have income from a small business? Yes**  **No**

**Do you own foreign property costing over \$100,000 Yes**  **No**

**Do you have income from a foreign pension? Yes**  **No**

**Did you sell your Principal Residence this year? Yes**  **No**  *If yes, additional form required.*

**Are you a Canadian Citizen? Yes**  **No**

**Can CRA share your personal information with Elections Canada? Yes**  **No**

**Do you have Status as a Canadian Indian? Yes**  **No**

**MAILING ADDRESS:** \_\_\_\_\_ **City:** \_\_\_\_\_

**Apt.:** \_\_\_\_\_ **P.O. Box:** \_\_\_\_\_ **RR#:** \_\_\_\_\_ **Province:** \_\_\_\_\_ **Postal Code:** \_\_\_\_\_

**PHONE #:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

**PLEASE LIST ANY MISSING INCOME SLIPS:** \_\_\_\_\_

**HOW MANY INCOME SLIPS INCLUDED?** \_\_\_\_\_ **Please check if no income:**

**BC Renters Tax Credit:** Do you rent your home? Yes  No  Landlord: \_\_\_\_\_

Monthly Rent: \_\_\_\_\_ # Months rented: \_\_\_\_\_ (pad rent does not qualify but nursing home does)

**OTHER DEDUCTIONS:**

**NON-REFUNDABLE TAX CREDITS:**

Medical Expenses:  Charitable Donations:  Other:

Do you have a Disability Tax Credit **on file** with CRA? Yes  No

*Note: Disability Tax Credit is not the same as CPP Disability or BC Persons With Disability (PWD)*

**ACKNOWLEDGMENT – preparation by volunteers**

I am fully aware that my income tax and benefit return is being prepared by a volunteer under the Community Volunteer Income Tax Program (CVITP) and that this volunteer is not acting as an agent of the Canada Revenue Agency.

**DECLARATION of accuracy**

I declare that all information on this form is correct and that I have fully disclosed my income from all sources.

**AUTHORIZATION for representation**

I authorize the volunteers preparing my return to represent me in communications with the CRA, and to use the Autofill My Return and/or Represent a Client services on my behalf.

**AUTHORIZATION for completion and electronic filing**

I authorize the CVITP volunteer to complete and where applicable electronically file my income tax return.

Name of organization: **Seniors' Resource Centre (Salmon Arm) Society**

X \_\_\_\_\_

Date: \_\_\_\_\_

Signature (must be signed by the individual requesting service)

**ACKNOWLEDGEMENT - tax return paper pickup**

I understand that I am responsible to pick up my tax papers by **April 30** or, according to CRA's mandate, **all my papers will be shredded.**

**Client initials:** \_\_\_\_\_