TAX PREPARATION ASSISTANCE

Volunteer Chartered Professional Accountants preparing personal tax returns for individuals in their communities who truly need assistance.

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

- Without dependants with a gross household income of less than $30,000
- With dependants, including a spouse or equivalent, with a gross household income of less than $40,000 for a household of two (add $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

Please see reverse for the Tax Preparation Assistance checklist.
What you need to bring:

1. A 2017 tax return form
2. A copy of completed 2016 income tax return and 2016 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 (if in 2017)
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)
   - 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
   - Child Care Benefit Statement RC62
   - Working Income Tax Benefit Advance Payments Statement RC210
   - All foreign income receipts/statements
   - US Social Security Statement (including the year client(s) started collecting)

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 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.

**Appointment Details**

DATE: ______________________________________________________________

TIME: ______________________________________________________________

LOCATION: __________________________________________________________