

Anonymous Tax Tracking Sheet – Location: Sunrise

Information provided is used for evaluation purposes and personal information only used if consent given. Please CIRCLE or fill in appropriate answer.

- 1. Gender:** _____
- 2. Age Range:** Under 18 18-59 60-64 65+
- 3. Residency Status:** Canadian Citizen Permanent Resident Refugee Work Visa
Int. Student Other
- 4. Do you identify as Indigenous (Metis, First Nations, Inuit):** Yes No
- 5. Source of Income (2018):** Income Support (Alberta Works, E.I., or AISH) Employment
Pension CPP Disability WCB No Income Other: _____
- 6. Did you move to Canada in 2018:** Yes No
- 7. Marital Status as of December 31, 2018:** Single Divorced/Widowed
Married/Common Law Separated
- Did you have a change of marital status in 2018? Yes No
- 8. Do you have any children under 18 (as of December 31, 2018) who are living with you?** Yes No
If yes, ages of children: _____.
- 9. Do your children have Registered Education Savings Plans (RESP):** Yes No N/A
- 10. Are any of your children under 12 and in child care, preschool, early learning, or cared for by a relative?**
Yes No N/A
- 11. Does a spouse or child in your care have a long term mental, learning or physical disability?**
Yes No
- 13. Would being charged to file your taxes have created a burden for you?**
Yes No
If you couldn't file your taxes here, where would you have gone? _____
- 14. Would you like help opening a My Canada or My Service Canada Account?**
Yes No Already have one

If you want more information about the benefits of having one of these accounts, talk to your tax filer.

----- OPTIONAL -----

Would you like information on budgeting, RESPS, banking, debt management, financial issues? If so, please provide your contact information.

Name: _____ Phone Number: _____

Email: _____

Tax Return Summary

Tax Return Line No	Benefit	Dollar Value	Provided application package (✓)
113	Old Age Security Pension (OAS)	\$	
114	Canada Pension Plan (CPP)	\$	
146	Guaranteed Income Supplement (GIS)	\$	
150	Gross Income	\$	
236	Net Income	\$	
453	Working Income Tax Benefit	\$	
484	Refund	\$	
485	Owing	\$	
	GST/ HST Credit	\$	
	Alberta Climate Leadership Adjustment Rebate (ACLAR)	\$	
	Canada child benefit	\$	
	Alberta child benefit	\$	

Other Benefits

Benefit	Already Receiving (✓)	Provided application package (✓)
Alberta Adult Health Benefit		
Alberta Child Health Benefit		
Alberta Blue Cross Coverage for Seniors		
Alberta Senior's Financial Assistance Programs		
Child Care Subsidy		
Disability Tax Credit		
Fair Entry		
Registered Education Savings Plan (RESP)		
Other:		

Other Years:

Year	Refund	Owing
2017		
2016		
2015		
2014		
2013		
2012		
2011		
2010		

Does the participant have Direct Deposit:
 Yes No N/A Information given to start

Notes and follow-up:
