

Independent filing method: Email template

This email template was used by EBO to support clients who completed their tax returns independently following an intake appointment. The text is provided here as a sample.

Email template

Hello XXXXX

First of all, thank you very much for taking part in this pilot project where EBO will help you file your 2019 taxes by yourself.

Here is the link to the TurboTax Software specifically created for this project by Intuit: www.turbotax.ca/taxclinic

Phone appointment

Your follow up appointment for direct phone support will be on **Date at Time**

I will call you at that time from **my phone number**
or

A volunteer working with EBO will call you at that time. Please do pick up the phone at that time even if the caller Id of our volunteer is hidden.

Tax preparation

To prepare your taxes with TurboTax, click on the link above, **create an account with Intuit** and then follow the flow of questions from the software. This is that simple!

Do not be intimidated. I believe that you can make it all the way to the end before your appointment. At a minimum you will be able to go over the 1st "My Info" section. Take notes of any question you might have, and I'll help you out.

Based on the initial interview you had with me, your 2019 tax situation is fairly straightforward, so here is a rundown of the steps that you will roughly follow:

- 1 **My info:** Enter your personal information and answer all mandatory questions
- 2 **Autofill My Return: SKIP** that section, unless you fill comfortable to connect to your CRA account (if you have one). In that case you will not enter your T-slips yourself, but you will have to make sure that they have been entered correctly in the next sections.
- 3 **Income:** in T-slips, **select T5007 and enter your two T5007**
- 4 **RRSPs: SKIP** that section
- 5 **Deduction: SKIP** that section
Deduction: select Student, then Tuition fees and **enter your T2202 information**
- 6 **Provincial (Ontario):**
 - Climate Action Incentive is preselected (keep it)
 - Then answer questions for the Trillium Benefit (you paid rent in Ontario in 2019 : yes, the rest no)
 - **Enter info about your rent** (address, number of months, amount of rent paid in total for 2019, type of payment, name of landlord)

There might be a few more questions after that, but you should be almost done by then.

If needed, you can look into the attached user-guide and/or document checklist which is provided by intuit and is attached for your convenience.

I am really looking forward to help you finish up your taxes on **Friday**.