

# CVITP (NORQUAY BUILDING)—WELCOME FORM

Information provided is anonymous and used for evaluation and statistical purposes

**Volunteer Name:** \_\_\_\_\_ **Station #** \_\_\_\_\_

## Basic Information: WELCOME!

How did you file your taxes last year/couple of years during COVID?

- Didn't File
- Paid a Tax Service
- Used other free clinic
- Virtual tax filing (phone)
- Drop off Tax Service
- Other

1. **Date of Birth:** DAY/MONTH/YEAR Current Age: \_\_\_\_\_

2. **Province of Residence** on December 31, 2022: \_\_\_\_\_

3. **Marital Status**—As of December 31, 2022:

- Single
- Married/Common-law
- Separated/Divorced
- Widowed

If married/common-law:  
Partner's DOB: \_\_\_\_\_ Age: \_\_\_\_\_  
DAY/MONTH/YEAR

Did your Marital Status Change in the year?  Yes  No  
If 'YES' what is the date of change?: DAY/MONTH/YEAR

4. **Do you identify as Indigenous**  No  Yes— are you status?  No  Yes—if yes:

Did you live OR work on a First Nation community (exempt income?)  Yes  No

5. **Residency Status:**

- Canadian Citizen
- Permanent Resident
- Temporary Resident
- Refugee Claimant

6. **Did you move to Canada in 2022?:** \_\_\_\_\_ **Are you getting GST?** \_\_\_\_\_

Yes—Arrival Date: DAY/MONTH/YEAR  Yes  No

7. **Sources of Income:**

- Employment
- EI (Employment Insurance)
- No Income
- Pension
- WCB
- Living on Savings
- EIA (Social Assistance)
- Scholarships/Bursary
- Other:

8. **If you have dependants, how many who are under 18 years old** (as of Dec 31/22) **live with you?** \_\_\_\_\_ **For these children do you have:**

- Birth Certificate
- Social Insurance Number (SIN)
- RESP (Registered Education Savings Plan)
- CLB (Canada Learning Bond)

9. **Do you/dependant have a severe/prolonged mental or physical disability?**  Yes  No

If Yes, are you approved by CRA to claim the Disability Tax Credit (DTC)?  Yes  No

If Yes, and the disabled person is under age 49—do you have a RDSP?  Yes  No

10. **Tell me about your housing situation (tick all that apply): # of months rent/own:** \_\_\_\_\_

- Don't pay rent
- Gets MB Rent Assist
- Senior's Only Housing
- Room & Board
- EIA pays rent direct
- Rent in private market
- Living in a hotel
- Home Owner
- Subsidized housing
- Rent with roommate
- Student Housing
- In Jail—Dates \_\_\_\_\_

11. **Were you a student in post secondary school during the tax year?**  Yes  No

12. **How do you receive your refunds from the Canada Revenue Agency?**

- Direct deposit to my bank
- Gets cheques in the mail—if so, does tax filer want to:
  - Start direct deposit with current tax return (has banking info to enter)
  - Obtain Direct Deposit form to take to bank and submit separately
  - Continue to receive via mail
  - Has no bank account & would like info on opening a bank account

13. **WINNpass Eligible? - 50% reduction in transit fares for:**

- Between ages 18-64?
- On EIA OR Low income (household income below LICO)?
- Permanent resident or refugee arrived in the year and no tax return filed yet?

## Seniors—Ask about:

- 55 Plus supplement
- School tax assistance for tenants 55+ (can apply for past 4 years) **Print MB 479 Schedule**
- Spousal allowance/Allowance for the survivor
- Guaranteed income supplement (GIS)

## New Immigrant?

- GST eligibility from first quarter after date of entry (form RC 151)

## Families— Ask About:

- Canada Child Benefit—including additional benefits for disabled kids
- Expecting a Baby? Ask about the **Manitoba Prenatal Benefit**
- Low income but NOT ON EIA? Ask about the **Manitoba Child Benefit Program**
- Canada Education Savings Program (CESP) - Government help to save for your child's education. FREE money for low income families from the **Canada Learning Bond** when you open a Registered Education Savings Plan (RESP)

## Have a Disability? Ask About:

- Disability Tax Credit
- Primary Caregiver Tax Credit
- Manitoba Pharmacare
- Registered Disability Savings Plan

## Housing Benefits—Ask About:

- Tenants who DO NOT live in subsidized housing and DO NOT receive EIA
- Manitoba Non-EIA Rent Assist Program
  - Education Property Tax Credit or Residential Renters Credit (2022)
  - Can/MB Housing Benefit (CMHB) for specific vulnerable populations

## Post Secondary Students? Ask About:

- T2202A needed for tax years before 2019 as not on file with CRA
- Tuition & Canada Training Credit Carry forwards

## Keep your refund safe—Ask About:

- How to set up Direct Deposit
- How to open a bank account

**2022 TAX INFORMATION: From Tax Summary**  
**Net Income (Line 23600):** \_\_\_\_\_

**PARTNER'S INFO:**  
**Net Income (Line 23600):** \_\_\_\_\_