

**Drop Off Program - Screening Sheet**

Was your income low and do you have a simple tax situation ?      Yes

If no, you do not qualify for the volunteer assistance with the preparation of your income tax return

Note: We will NOT prepare a return with business, rental income or capital gains, OR a complex return for a deceased.

<b>Your Information</b>		<b>Spouse's Information</b> Only if spouse has no income	
S.I.N		S.I.N	
Name		Name	
Current Address		Current Address	
City, Prov & Postal Code		City, Prov & Postal Code	
Date of Birth <i>Year/ Month/Day</i>	Phone No	Date of Birth <i>Year/ Month/Day</i>	
Did your last name change last year	Yes	If yes, have you notified CRA	Yes      No
Do you have any unfiled previous years tax returns ?	Yes	Years	
CRA can now email your notice of assessment, if you prefer this please enter your e-mail address.			
e-Mail Address:			

<b>Marital Status</b>	Married	Common Law	Widowed	Divorced	Separated	Single
<b>As Dec 31 2019</b>	Did your marital status change in the year		Yes	Date		

Please note: If you have a spouse you both must file an income tax return regardless of income levels to remain eligible for benefit programs such as GST/HST, CCB, Trillium

<b>Children who lived with you during the year.</b>			
Child's Name <i>(If you need more room, please attach a separate piece of paper)</i>	Date of Birth	Child Income	Did the child live with you on Dec 31st If no, please provide details

<b>Other Information</b>	Yes	No
Are you a Canadian citizen ?		
May we provide your Name, address & D.O.B to Election Canada to update the voting list ?		
Did you live in Ontario on Dec 31st of the year ?		
Did you sell a principal residence or property during the year ?		
Did you enter Canada as an immigrant during the year ?      Date		
Do you own any foreign property with a total cost of more than \$ 100,000 Cad ?		

**Expenses:** Did you pay any of the following expenses during the year ?

**Note:** To claim the expenses you MUST have a receipt (*Or be able to obtain one*)

Type of expense	Yes	Amount
RRSP Contribution		\$
Moving Expenses		\$
Student loan interest		\$
Medical Expenses		\$
Property Taxes		\$
Rent		\$
Address 1		
Address 2		

Type of expense	Yes	Amount
Child Care		\$
Tuition		\$
Child Support		\$
Spousal support		\$
Seniors home reno		\$
# of months	Amount	Landlord's name

Other Information	Yes
Did you receive CERB CRB CRCB CRSB CEWS	
If yes to above please specify the amount for each received	Amount
Do you have a disability tax credit certificate on file with CRA ?	
Did your children transfer any tuition amounts ? ( <i>If yes, provide T2202 from student</i> )	
Did you receive any income not on a T4 slip ? ( <i>tips, Support, odd jobs etc.</i> ) <i>Excluding T5007</i>	
Did you receive child/spousal support	Yes Total for the year
Are you filing an income tax return for the first time ?	
Do you own any foreign property with a total cost of more than \$ 100,000 Canadian ?	
Were you and your spouse living separate and apart on Dec 31st of the year	
<i>Reason you lived apart... Breakdown of relationship Medical, educational, business</i>	
<i>Spouse's address while living apart.</i>	
Are you currently in bankruptcy status	Yes If yes, have you been discharged Yes No
Are you claiming home office expenses	Yes If yes, Please fill out a Employment home office expenses form

<b>Please attach the following:</b>	Refund	Trillium
<i>Your tax information and slips</i>	Owing	CTB
<i>A copy of last years return if available</i>	GST	OHPTG
<i>Last years <b>NOA</b> If available</i>		

I have answered the above questions to the best of my knowledge  
 I give permission to a member of the Volunteer Income Tax Program to complete and e-file my tax return.  
 Signature \_\_\_\_\_ Date

**This area for tax preparer**  
 Name \_\_\_\_\_ T1 Completed on \_\_\_\_\_