

Income Tax Information — See over for eligibility of program & important numbers →

*** PLEASE get a **pharmacy printout** of prescriptions from January 1st to December 31st instead of bringing in piles of receipts

*** If you are **MISSING SLIPS** please ask for and sign a form **AUT-01** and we can try to pull your slips off CRA website if you are in person with volunteer

Did you claim bankruptcy in the tax year you wish to file? Yes No

First Name: _____ Last Name: _____

Mailing Address: _____ City: _____

Postal Code: _____ Phone _____

Date of Birth: Day _____ Month _____ Year _____

Social Insurance Number: _____

Treaty/Indian Status Number if applicable: _____ Living on reserve? Y N

Did you sell a principal residence in this tax year? Y N

If yes, please specify **date and amount** sold for: **Date:** _____ **Amount:** _____

Marital Status: (circle one)

- Single (never married)
- Married
- Divorced
- Common-law
- Widowed
- Separated

Has your marital status changed in the last year? If so, how? If separated, how long?

Please Provide Exact Date of Change:

Spouse name: _____ Spouse Social Insurance No. _____ Spouse Net Income: _____

Are you a Canadian Citizen? Y N

Do you want to register for Elections Canada? Y N

What years of taxes are you submitting for? _____

Is this your first-time filing? Y N

Do you own foreign property? Y N

Do you have any dependents? Y N If yes, please fill in info below:

Name of Dependents	Date of Birth	Social Insurance Number if you have them

More dependents:

Volunteer Income Tax Program Eligibility:

Suggested income levels

1 person \$35,000

2 persons \$45,000

3 persons \$47,500

4 persons \$50,000

5 persons \$52,500

more than 5 persons \$52,500 plus \$2,500 for each additional person

MUST BE A RESIDENT OF TOWN/COUNTY OF PONOKA

Simple tax situation:

In general, your tax situation is simple if you have no income or if your income comes from these sources:

- employment
- pension
- benefits such as Canada Pension Plan, disability, employment insurance, social assistance
- registered retirement savings plans (RRSP's)
- support payments
- scholarships, fellowships, bursaries or grants
- interest (under \$1,000)

Your tax situation is not simple if you:

- are self-employed or have employment expenses
- have business or rental income and expenses
- have capital gains or losses
- filed for bankruptcy
- are completing a tax return for a deceased person

Phone numbers you may need:

For missing slips or information for Canada Pension Plan CPP, Old Age Security OAS, Guaranteed Income Supplement GIS information call 1-800-277-9914

Universal Child Care / Child Tax Benefit Info or slips call 1-800-387-1193

GST 1-800-959-1953

Individual Income Tax Enquiries 1-800-959-8281

Alberta Seniors ASB 1-800-644-9992