

CVITP (NORQUAY BUILDING)—WELCOME FORM

Information provided is anonymous and used for evaluation and statistical purposes

Volunteer Name: _____ **Desk #** _____

Basic Information: WELCOME! HOW MANY RETURNS ARE YOU FILING? _____

Including this year, how many years have you filed taxes at Norquay? _____ times

This year, how many times were you turned away because we were too full? _____ times

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

2. **Province of Residence** on December 31, 2019: _____

3. **Marital Status**—As of December 31, 2019:

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

If married/common-law:
Partner's DOB: _____
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 AND have 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

6. **Did you move to Canada in 2019?:** **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 31/19) **live with you?** _____ **For these children do you have:**

- Birth Certificate
- RESP (Registered Education Savings Plan)
- Social Insurance Number (SIN)
- 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):**

- 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 in 2019 (or Jan to Apr 2017)?** Yes No

If Yes: Did you claim the MB Advance Tuition Rebate in 2017? Yes No

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

- Direct deposit to my bank
- I get 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

Seniors—Ask about Seniors Benefits:

- 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

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 children)
- 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 Educa-

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 (Rent Credit—one per address)

Post Secondary Students? Ask About:

- T2202A needed
- Adjust for MB Tuition Fee Income Tax Rebate Advance for Jan to Apr of 2017

Keep your refund safe—Ask About:

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

2019 TAX INFORMATION: From Tax Return Summary

Net Income (Line 236): _____
 CAI (Line 449): _____
 CWB (Line 453): _____
 MB Credits (Line 479): _____
 Total Refund (line 484): _____
 Balance (line 485): _____

PARTNER'S INFO:

Net Income (Line 236): _____
 CAI (Line 449): _____
 CWB (Line 453): _____
 MB Credits (Line 479): _____
 Total Refund (line 484): _____
 Balance (line 485): _____