

guiding you in the right direction.



COMMUNITY
Financial Counselling Services

**Tax Filing & Access to Benefits
Community Forum**

EXPANDING SERVICES in the COMMUNITY

A nationally accredited non-profit credit counselling agency



Why consider a year-round tax clinic?

- Current CVITP Feb.-April tax clinics often do not have the capacity to meet need
- People do not become aware of the need to file taxes until after April 30
- People find it difficult to get organized to get to a tax clinic between February and April
- People are not made aware of the need to file taxes until they do not receive Child Benefit or GST until July or are applying for a benefit that requires an income tax return.

Requirements to offer a year-round tax filing service

- Basic requirements: Intake, volunteers/staff trained to prepare taxes and with an EFile number, computer, printer, internet, space
- Your agency and your volunteers should be registered with CRA- registration available online December-April at CRA website.
- There maybe less demand so fewer days of operation and fewer volunteers needed i.e. CFCS tax service operates 2 days/week with 3 volunteers/day- taxes filed by appointment. May-November
- Tax clinics need not operate 12 months- there is a period of time in January where current years taxes cannot be EFiled.
- There is the possibility that your agency could offer a tax service on a “drop-off” basis. With taxes prepared by CFCS volunteers.
- **IMPORTANT-** A tax clinic offered past the Feb-April period will need at least one staff/volunteer very experienced in tax filing. The CRA dedicated CVITP help line does not operate after April 30, and there is no assistance from Norquay Bldg. tax clinic. Limited resources available from CFCS volunteers/staff.

Finding & Training Volunteers

- First place to look is within your existing volunteers. Make volunteers aware of the monetary benefit to clients of filing taxes.
- CRA may have volunteers who have registered without specific agency attachment.
- Volunteer MB can help with advertising for volunteers
- Agencies without volunteers or who do not have a “volunteer culture” could possibly partner with agencies that can provide volunteers.
- Training is available through the CRA webinars (very basic and not recommended as only source for new volunteers) and in person training offered January/February by CFCS.
- If you are contemplating a year-round tax filing service we would recommend that a staff person and/or volunteer take a formal tax filing course i.e. HR Block offers a basic tax preparation course approx. 4 hrs/week September-mid-December cost \$299.

Funding and Other Supports for Tax Filing

- There is no designated funding to support tax filing services
- Some agencies have received funding through United Way, Winnipeg foundation and by including funding for tax preparation in their ongoing operational budgets.
- CFCS can in some cases provide support that includes assistance with setting up a tax service, volunteer/staff training in tax filing and access to benefits, loan of computer equipment.
- CRA can provide advice, end of life computers and laptops although the supply is limited and other materials,
- Requests for funding of tax filing services are enhanced by noting their considerable “Return on Investment” i.e. CFCS prepares 10,000.00 tax returns which results in \$30 million dollars in Tax Refunds, Child Tax Benefits and GST Rebates to low income individuals and families in Winnipeg. Our Return on Investment is over 2000%. CFCS returned more than \$760,000.00 to 700 families in assisting them to access additional benefits after filing taxes.
- Important to keep data on number of returns filed and refund amounts which is amiable on the executive summaries printed upon filing.

How to Reach People

- Advertise among your client population. Insure that your staff makes them aware of the importance of filing taxes and applying for the all benefits they are eligible.
- Ensure that your agency staff are aware of the benefits of tax filing.
- Make tax filing and access to benefits is a core message to your clients.
- List your tax filing service on the CRA website
- Contact partner agencies, other institutions and organizations in your community to make them aware of your tax filing service
- Reach out to partner agencies, institutions and organizations in your community to emphasis the importance of and benefits to low –income populations of filing their income taxes

Other Ways to increase Capacity

- Partner with other Agencies to provide tax filing at their location for specified time periods.
- Add an Access to Benefits component to your tax filing services
- Reach out to other agencies in the community to hold a tax clinic if only for a few days for their own clients
- If you have a successful tax filing service support other agencies in your community to develop tax filing services
- Through the Manitoba Financial Empowerment Network (MFEN) and conferences such as this work together to:
 - explore ways to work together to coordinate year-round tax filing and access to benefits services
 - Support one another to improve our tax filing services
 - advocate with CRA to provide more resources (funding and other) to CVITP
 - Advocate with CRA/Service Canada to provide on site assistance with identification, SIN, tax information and tax filing resources to assist more low income individuals and families to file taxes.
 - Advocate with CRA to produce comprehensive data on low income tax filing in Manitoba
 - Appeal to funders for support of tax filing services.

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THANK YOU