

CVITP (_____)—WELCOME FORM

Information provided is anonymous and used for evaluation and statistical purposes

Volunteer Name: _____ **Desk #** _____

Basic Information: **WELCOME!**

Is this the first year you have had your taxes done by the CVITP? Yes No—for ___ Yrs

How many years of taxes do you need to file? _____

1. **Gender:** Female Male Other: _____

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

3. **Province of Residence** on December 31, 2018: _____

4. **Marital Status**—As of December 31, 2018:

- Single Married/Commonlaw
 Separated/Divorced Widowed

Did your Marital Status Change in the year? Yes No

If 'YES' what is the date of change?: DAY/MONTH/YEAR

5. **Do you identify as First Nation/Metis/Inuit?** No Yes—if yes:

Do you reside in a First Nation's Community? Yes No

6. **Residency Status:**

- Canadian Citizen Permanent Resident Temporary Resident Refugee

7. **Did you move to Canada in 2018?:** **Are you getting GST?**

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

8. **Sources of Income:**

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

9. **If you have dependents, how many who are under 18 years old (as of Dec 31/18) live with you?** _____ **For these children do you have:**

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

10. **Do you/dependent 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

11. **Your housing situation (tick all that apply):**

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

12. **Were you a student in post secondary school in 2016 or Jan to Apr 2017?** Yes No

If Yes: Did you claim the MB Advance Tuition Rebate those years? Yes No

13. **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)** - get help from the Government to save for your child's education. Including 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**

Post Secondary Students? Ask About:

- Adjustment for the MB Tuition Fee Income Tax Rebate Advance for 2016 or Jan to Apr of 2017**

2018 TAX INFORMATION: Complete from info on Tax Return Summary:

Net Income (Line 236): _____ CAI (Line 449): _____
WITB (Line 453): _____
Provincial Credits (Line 479): _____
Total Refund (line 484): _____ OR Balance (line 485): _____

Keep your refund safe—Ask About:

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