

## Income Tax 2024 - Intake Form

**Important: Your income tax will not be filed until you come to the MSA office to sign for it.**

Volunteers **DO NOT** complete Individual Income Tax Returns for the following situations: deceased person, business or rental income, employment expenses, capital gains/losses, or for income over \$35,000 for families or \$25,000 for an individual.

### Your information

Name: \_\_\_\_\_  
Last Name First Name Middle Initial

SIN: \_\_\_\_\_ Date of birth (d/m/y): \_\_\_\_\_

Are you a Canadian citizen? Yes \_\_\_\_\_ No \_\_\_\_\_

Current mailing address:

\_\_\_\_\_  
Apartment/Unit number Street number Street name

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal code: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Marital Status:

Married \_\_\_\_\_ Common Law \_\_\_\_\_ Widowed \_\_\_\_\_ Separated \_\_\_\_\_ Single \_\_\_\_\_ Divorced \_\_\_\_\_

On December 31, 2023 which province or Territory were you living in? \_\_\_\_\_

Did you immigrate to Canada in 2023? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes:

- What is your date of entry (d/m/y)? \_\_\_\_\_
- Please indicate income earned before entry to Canada (in Canadian dollars) \_\_\_\_\_

Did you pay rent in 2023? Yes \_\_\_\_\_ No \_\_\_\_\_

Amount per month \$ \_\_\_\_\_ How many months? \_\_\_\_\_

Landlord name: \_\_\_\_\_

**Your spouse's information**

Name: \_\_\_\_\_  
Last Name First Name Middle Initial

SIN: \_\_\_\_\_ Date of birth (d/m/y): \_\_\_\_\_

Is your spouse a Canadian citizen? Yes \_\_\_ No \_\_\_

Is your spouse living in Canada with you? Yes \_\_\_ No \_\_\_

**Your dependent's information (children under 18 years old)**

<b>Last name</b>	<b>First name</b>	<b>Date of birth (d/m/y)</b>

## Direct Deposit Information

Bank number \_\_\_\_\_ Transit number \_\_\_\_\_ Account number \_\_\_\_\_

## General Information

To ensure that your return is completed promptly and accurately, please verify that you have all the necessary information below that applies to your situation.

### Information Slips

- T4 - Salary and wages
- T4A, T5, T3 - Pension, annuity, and investment income, Canada/Ontario savings bonds
- T4E - Employment insurance benefits
- T5007 - Social assistance payments/ Worker's compensation benefits

Receipts for expenses and credits (Please total each deduction before dropping off)

- Child care expenses and a completed T778, if you have one
- Union dues
- Tuition fees and education amount (T2202)
- Medical expenses (Please make a list & add up all of the receipts to help the preparer)
- Charitable/political donations (Please make a list & add up all of the receipts to help the preparer)
- All property taxes or rent paid (Please make a list & add up all of the receipts to help the preparer)

I understand that a CRA-CVITP Registered Volunteer will be preparing my income tax return based on the information I have provided. I further understand and agree that the volunteer of the office where the service is provided are not accountants and I agree they will not be held responsible or liable, financially or otherwise, for any errors or omissions that may occur in the preparation of my tax return.

\_\_\_\_\_

Signature

\_\_\_\_\_

Date