

**Community Volunteer Income Tax Program (CVITP)
SAIT Students' Association (SAITSA)**



Client Intake Form

****please print clearly****

SECTION A – Client Information

First Name _____	Last Name _____
Address _____	
City/Province _____	Postal Code _____
Email Address _____	Phone # _____
<i>(provide current contact information so we can reach you for more information on your taxes)</i>	
Province of residence as of December 31, 2018 _____	
Date of Birth _____ <i>(dd/mm/yy)</i>	SIN or ITN _____ <i>(must be one of these numbers, cannot be SAIT ID)</i>
Are you a Canadian citizen? Yes No	Are you a permanent resident? Yes No
Landing date _____	

SECTION B – Tax Information

Net income \$ _____ (Total of ALL T4s for the Client) (must be less than \$35,000 or as per rates if you are married or have children)
Do you have your last year's Notice of Assessment from the government? Yes No
Which tax year are we processing? 2017 2018
Is this your first time filing Canadian taxes? Yes No
Did you own foreign property in 2017 or 2018 with a total cost over \$100,000CAN? Yes No
Do you want to transfer any amount to spouse or parents? (Tuition or education from your T2202A) Yes No

SECTION C – Spousal Information

Marital status

- married
 single
 separated *(you are considered separated if you have been living separately and apart from your spouse or common law partner for a period of 90 days or more due to a breakdown in your relationship)*
 divorced
 common law

Has your marital status changed within the last year? Date of change _____

Yes No

(if your marital status has changed within the last year, spouse's general information must be listed below)

(If you are single AND your relationship status has not changed within the last, STOP here go to section D)

Are you paying alimony?

Yes No

First Name _____ Last Name _____

Address _____

City/Province _____ Postal Code _____

Email Address _____ Phone # _____

(provide current contact information so we can reach you for more information on your taxes)

Province of residence as of December 31, 2018 _____

Date of Birth _____ SIN or ITN _____

*(must be one of these numbers, **cannot** be SAIT ID)*

Canadian citizen?

Yes No

Permanent resident?

Yes No

First time filing Canadian taxes?

Yes No

Landing date _____

Net income \$ _____

SECTION D – Dependant Information

Do you have children?

Yes No

(If no, STOP here and proceed to SECTION E)

Child 1 (family must make less than \$35,000 if single parent, \$42,500 if married)

First Name _____ Last Name _____

Address _____

City/Province _____ Postal Code _____

Province of residence as of December 31, 2018 _____

Date of Birth _____ SIN or ITN _____

Canadian citizen? Permanent resident? Gender
Yes No Yes No Male Female

Child 2 (family must make less than \$37,500 if single parent, \$45,000 if married)

First Name _____ Last Name _____

Address _____

City/Province _____ Postal Code _____

Province of residence as of December 31, 2018 _____

Date of Birth _____ SIN or ITN _____

Canadian citizen? Permanent resident? Gender
Yes No Yes No Male Female

Child 3 (family must make less than \$40,000 if single parent, \$47,500 combined if married)

First Name _____ Last Name _____

Address _____

City/Province _____ Postal Code _____

Province of residence as of December 31, 2018 _____

Date of Birth _____ SIN or ITN _____

Canadian citizen? Permanent resident? Gender
Yes No Yes No Male Female

SECTION E – Documents

Please check all that apply. If paperwork is not provided, we cannot prepare your taxes.

Document Needed	Yes	No	#
-----------------	-----	----	---

T4 (employment income)			
Old age security			
T4E (Canadian Pension Plan)			
RC-62 (Universal Child Card Benefit)			
T4A or other (Scholarships and Bursaries)			
T22-02A (Tuition, Education Credits)			
T4E (Employment Insurance)			
T4RSP or RRSP (RRSP Income) (Requires Previous Notice of Assessment)			
RL-5 (Worker's Compensation)			
T5007 (Social Assistance)			
Donation, Political Contributions			
Transit Pass Receipt (does NOT include U-pass paid with tuition)			
Moving Expenses (must include receipts)			
Alimony, Maintenance Income			
Medical Expenses (must include receipts)			
Notice of Assessment (previous year)			
Childcare expenses (must include receipts)			
Other receipts not listed on here -			
Other receipts not listed on here -			
Other receipts not listed on here -			
Other receipts not listed on here -			

SECTION F – Declaration (Signed by Client)

_____ By completing and signing this form I hereby allow the SAITSA Community Volunteer Income Tax
 Initials Program and its volunteers to process the submitted tax forms on my behalf.

_____ I agree that all information submitted, is correct and legal to the best of my knowledge and I take
 Initials full responsibility for the legitimacy of the information provided to the program.

_____ As a client of the SAITSA Community Volunteer Income Tax Program I am aware that in the case
 Initials of any missing vital forms or information my taxes cannot be prepared.

_____ I understand that my tax information with SAITSA will be destroyed at the end of April and all
 Initials inquiries will then have to go through the Canada Revenue Agency.

 Signature

 Date

 CVITP Representative (Volunteer)