

Community Volunteer Income Tax Program (CVITP)

- The Comprehensive client intake form is for clients who are **not single and/or have dependents**.
- Please print clearly and in capital letters.
- Your tax return can only be processed if you bring physical copies of your tax slips. Digital copies are not accepted.

| Do not use this area | |
|----------------------|------------------------------|
| Volunteer Name | _____ |
| Filed in system | <input type="checkbox"/> YES |

SECTION A – Eligibility

(circle true or false)

- | | |
|--|--------------|
| 1) All the tax forms you are reporting are eligible for the Tax Program (see form Additional Information, section A) | TRUE / FALSE |
| 2) You meet the requirements for total eligible income (see form Additional Information, section B) | TRUE / FALSE |
| 3) You owned less than \$100,000 in foreign property during the tax year (see form Additional Information, section C) | TRUE / FALSE |
| 4) You were a resident of Canada during the tax year (anytime between January and December) | TRUE / FALSE |
| 5) You are not an officer or a servant of another country such as a diplomat, or a family member or an employee of such a person, who were exempt from tax at any time in the taxation year | TRUE / FALSE |
| 6) You signed the CVITP Taxpayer Authorization form (please complete and sign this form in order to proceed) | TRUE / FALSE |

If you answered "FALSE" to any of the above, we are unfortunately unable to process your tax return. Please contact a professional accountant or tax preparation company to file your taxes.

Recommended tax preparation company:
H&R Block

If you answered "TRUE" to all of the above, continue to Section B.

SECTION B – Client Information

First Name _____ Last Name _____

SIN or ITN _____ (cannot be SAIT ID) Date of Birth (dd/mm/yyyy) _____

Are you currently a SAIT student in 2024? YES / NO

Were you a SAIT student last year in 2023? YES / NO

If yes to either of the above, enter your SAIT ID _____

Do you have dependants? YES / NO If yes, how many? _____

SECTION B – Client Information (continued)

Marital Status *(check mark one)*

- Single
- Married
- Separated (you are considered separated if you have been living separately for a period of 90 days or more)
- Divorced
- Common law (you are considered common law if you have been living together for 3 years or more in Alberta)

SECTION C – Situation on December 31

Province of Residence as of December 31st 2023 _____

Has your marital status changed during the tax year? YES / NO

If yes, enter date of change *(dd/mm/yyyy)* _____

SECTION D – Mailing Address and Contact Information

- Please provide current contact information so we can reach you for more information about your taxes if needed.

Apartment # *(leave blank if not living in apartment or condo)* _____

Street Address _____

City _____ Province _____ Postal Code _____

Is your home address the same as your mailing address?

YES / NO

If no, what is the current province of your home address? _____

Has your province of residence changed during the tax year? *(within Canada only)*

YES / NO

If yes, enter date of move *(dd/mm/yyyy)* _____

Phone # _____

is this phone # *(circle one)* HOME / WORK / CELLULAR

Email Address _____

Do you want the Canada Revenue Agency to send information regarding your taxes to this email?

If yes, you will no longer receive paper copies in the mail regarding your taxes. This includes your notice of assessment.

(see form Additional Information, section D).

YES / NO

SECTION E – Citizenship

Are you filing Canadian taxes for the first time? YES / NO

Are you a Canadian Citizen or Permanent Resident (PR)? CITIZEN / PR / OTHER

If you are a Canadian Citizen, would you like to give your name, address and date of birth to Elections Canada to update the National Registrar of Electors?
(see form *Additional Information, section E*). YES / NO

What was your principal place of residence as of December 31st 2023? (country) _____

SECTION F – Newcomers to Canada

- Complete this section if you arrived in Canada from abroad during the tax year.
 - If this section does not apply to you, **disregard this section, and continue to Section G.**
- Landing date you arrived in Canada (dd/mm/yyyy) _____
- Which country did you come from? _____
- Did you earn income outside of Canada during the tax year? YES / NO
- If yes, how much did you earn? (convert to Canadian dollars) \$ _____

SECTION G – Spousal Information

- Complete this section if you were married, separated, divorced or common law during the tax year.
 - If your spouse was a resident of Canada during the tax year and earned income in Canada, your spouse must fill out a separate intake form and be present when filing taxes (only applies to married and common law).
 - If you were single and your relationship status has not changed during the tax year, **disregard this section, and continue to Section H.**
- Spouse Information:
- First Name _____ Last Name _____
- SIN or ITN _____ (cannot be SAIT ID) Date of Birth (dd/mm/yyyy) _____
- Email Address _____
- Phone # _____ HOME / WORK / CELLULAR
- Is your spouse a SAIT student? YES / NO
- If yes, enter SAIT ID _____

SECTION G – Spousal Information (continued)

Is your spouse a Canadian Citizen or Permanent Resident (PR)? CITIZEN / PR / OTHER

Is your spouse filing Canadian taxes for the first time? YES / NO

Did your spouse earn income outside of Canada? YES / NO

If yes, how much did your spouse earn? (convert to Canadian dollars) \$ _____

If yes, from which country did your spouse earn income from? _____

Was your spouse a resident in Canada during the tax year? YES / NO

If yes, enter province of residence as of December 31st 2023 _____

Are you divorced and paying alimony? (Paying money to spouse under court's order) YES / NO

Does your spouse have the same address as you? YES / NO

If no, fill out the following:

Apartment # _____ Street Address _____

City _____ Province _____ Country of Residence _____

Postal Code _____

Did your spouse earn income in Canada? YES / NO

If yes, your spouse needs to fill out a separate intake form and be present when filing taxes.

SECTION H – Tax Documents

- Indicate all the tax forms you are reporting for the tax year and how many of each.
- Tax forms must be physical copies.
- If documents indicated below are not provided, we cannot prepare your tax return.

T4 (Employment income) YES / NO If yes, how many? _____

T4E (Canadian Pension Plan) YES / NO If yes, how many? _____

T4A (Pension, annuity, or other) YES / NO If yes, how many? _____

T4A (Scholarships, bursaries) YES / NO If yes, how many? _____

T2202 (Tuition, education credits) YES / NO If yes, how many? _____

T5 (Investment Income) YES / NO If yes, how many? _____

Other Documents (Medical, donations) YES / NO If yes, how many? _____

SECTION I – Dependents

- Complete this section if you have dependents.
- If this section does not apply to you, **disregard this section, and continue to Section J.**

Child One

First Name _____ Last Name _____

Address _____

City _____ Province _____ Postal Code _____

Province of Residence as of December 31st 2023 _____

Date of Birth (*dd/mm/yyyy*) _____ SIN or ITN _____

Relationship: SON / DAUGHTER / OTHER

Are you a Canadian Citizen or Permanent Resident (PR)? CITIZEN / PR / OTHER

Child Two

First Name _____ Last Name _____

Address _____

City _____ Province _____ Postal Code _____

Province of Residence as of December 31st 2023 _____

Date of Birth (*dd/mm/yyyy*) _____ SIN or ITN _____

Relationship: SON / DAUGHTER / OTHER

Are you a Canadian Citizen or Permanent Resident (PR)? CITIZEN / PR / OTHER

Child Three

First Name _____ Last Name _____

Address _____

City _____ Province _____ Postal Code _____

Province of Residence as of December 31st 2023 _____

Date of Birth (*dd/mm/yyyy*) _____ SIN or ITN _____

Relationship: SON / DAUGHTER / OTHER

Are you a Canadian Citizen or Permanent Resident (PR)? CITIZEN / PR / OTHER

SECTION J – Declaration (Signed by Client)

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

Initials

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

Initials

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

Initials

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

Initials

I understand that the refund or payment at the end of my filing is an **estimate** and the CRA will assess the submission which can cause the amount to increase or decrease.

Initials

/s/ _____
Client Signature

Date

For Volunteer Use Only

- Client's name, and SIN or ITN number is inputted correctly YES
- Client's address is inputted correctly YES
- Client's city for Climate Incentive Payment is correct YES
- Client's dependents are included YES
- Client Taxpayer Authorization form is signed and attached YES

/s/ _____
Volunteer Signature

Volunteer Name (please print)

/s/ _____
Tax Program Administrative Assistant