TAX PREPARATION ASSISTANCE

Volunteer Chartered Professional Accountants preparing personal tax returns for individuals in their communities who truly need assistance.

Personal tax preparation service is available at no charge to individuals:

- Without dependants with a gross household income of less than $30,000
- With dependants, including a spouse or equivalent, with a gross household income of less than $40,000

Volunteers do **not** prepare complex returns, such as returns for individuals who:

- Have self-employment income
- Have business or rental income and expenses
- Have capital gains or losses
- Have employment expenses
- File for bankruptcy
- Are deceased within the year

Please see reverse for the Tax Preparation Assistance checklist.

TAX PREPARATION ASSISTANCE CHECKLIST

What you need to bring:

1. A **2015 tax return form**
2. A *copy* of completed **2014 income tax return** and ***2014 Notice of Assessment***.
3. Social Insurance Number for you and your spouse/common-law partner
4. List of dependants and birth dates (day, month, year). Social Insurance Number for each dependant (if available)
5. Details of spouse's income and dependant's income
6. Date of marriage or separation (if in 2015)
7. Details of any alimony and maintenance payments received or paid
8. If a new immigrant, date of arrival in Canada
9. If first time buyer, details of home purchase
10. All receipts of income, for example:

    - Salary and wages **T4**
    - Statement of Pension, Retirement, Annuity and Other Income **T4A** (Scholarships)
    - Old Age Security **T4A (OAS)**
    - Canada Pension Plan benefits **T4A(P)**
    - Employment Insurance benefits **T4E**
    - Registered Income Fund income **T4RIF**
    - Registered Retirement Savings Plan income **T4RSP**
    - Interest and Dividend payments **T5**
    - Statement of interest trust **T3**
    - Worker's Compensation/Social Assistance Payments **T5007**
    - Universal Child Care Benefit Statement **RC62**
    - Working Income Tax Benefit Advance Payments Statement **RC210**
    - All foreign income receipts/statements
    - US Social Security Statement (including the year client(s) started collecting)

    All receipts of expenses, for example:

    - Property taxes and/or details of total rent paid during the year and all addresses of places of residence during the year and name(s) of landlord
    - Child care expenses (plus caregiver's Social Insurance Number) - **including Form T778**
    - Medical expenses
    - Charitable and political donations
    - Child fitness, arts and other qualifying activity receipts
    - Public transit passes and receipts, and electronic payment cards
    - Union or professional dues
    - Tuition fees/education amount **(T2202/T2202A)**
    - Student loan interest
    - RRSP contributions
    - If this is the first year of claim, or if the previous one had expired, a copy of the disability certificate Form **T2201**
    - For a senior (65 or older) or non-senior living with a family member who is a senior, include receipts for **permanent** home modifications that improve accessibility or help the senior be more functional/mobile (e.g., grab-bars installed in the shower or bathroom)

APPOINTMENT DETAILS

DATE: ______________________________

TIME: ______________________________

LOCATION: ______________________________

CHARTERED PROFESSIONAL ACCOUNTANTS ONTARIO