

Canada Revenue Agency - CVIT Program Exclusions:

The CVIT program of the Seniors Outreach & Resource Centre cannot file your taxes if you have:

- Self-employment income
- Capital Gains or losses: On dispositions of shares, stocks, assets
- Sale of a personal home
- Interest and/or Investment income greater than \$1,000
- Business and/or rental income and expenses
- Employment expenses
- Filed for bankruptcy
- A deceased person or spouse
- Ownership of Foreign Property
- Missing information
- Total Income above \$35,000 for single
- Total Income above \$45,000 for couple

**I am aware to the best of my knowledge that none of the above noted exclusions pertain to me.
As such, I declare that I am eligible to get my taxes filed with the CVITP program this year.**

Signature

Date

**Community Volunteer Income
Tax Program Authorization**

Tax Year _____

- Before you complete this form, read the information and instructions below.
- You must complete and sign all sections A), B) & C) below, to allow a Community Volunteer Income Tax Program (CVITP) volunteer to prepare your *Income Tax and Benefit Return*.

A): Taxpayer disclaimer

I am fully aware that my income *Tax and Benefit Return* is being prepared by a volunteer under the Community Volunteer Income Tax Program and that this volunteer is not acting as an agent of the Canada Revenue Agency.

Seniors Outreach & Resource Centre-KelownaX _____
Signature_____
Date_____
(Signed at (name of organisation & place))**B): Taxpayer Declaration and Authorization**

I declare that the information entered in Part A (of Questionnaire) is correct and complete. I also declare that I have read the information below and I authorize the electronic filer named Seniors Outreach & Resource Centre under file ID# U9871 to electronically file my income tax and benefit return.

X _____
Signature_____
Date**C): Certification and Authorization**

By signing and dating this section, I authorize the approved representative of the Seniors Outreach & Resource Centre under ID# U9871, to access my tax information through the Canada Revenue Agency CVITP-AutoFill My Return Program, pursuant to section 241 of the *Income Tax Act*.

X _____
Signature_____
Date

**Please fill out the forms below and attach all relevant documentation.
Return package to 115-2065 Benvoulin Court, Kelowna, BC
One form needed per person.**

Part A: Identification and address as shown on your Income Tax Return

Last Name: _____ First Name: _____

Social Insurance Number: _____

Birthday: _____ / _____ / _____
Day Month Year

Mailing Address: _____

City: _____ Postal Code _____

Phone Number: _____ Email: _____

Have you moved in the last 12 months? Yes No

If YES, what was the date and from where? _____

Marital Status (Circle one): Single Married Common-Law Separated Widowed Divorced

Has your marital status changed in the last 12 months? Yes No

If YES, please include the following spousal information:

LEGAL NAME: _____ DATE OF SEPARATION _____

CURRENT ADDRESS: _____ SIN _____

DATE OF BIRTH: _____ NET INCOME: _____

Do you have dependent children? Yes No; If YES, please include the following information:

NAME _____ BIRTHDAY (Age) _____ SIN _____ Income _____

NAME _____ BIRTHDAY (Age) _____ SIN _____ Income _____

Have you had your taxes filed with our organization before? Yes NoAre you a Canadian Citizen? Yes NoDo you want your Information to be Shared with Elections Canada? Yes No

Do you have foreign pension income? Yes No **If YES**, please provide the information:

1) Where from _____

2) Monthly foreign income _____

3) Canadian converted amounts (CDN bank a/c] _____

Have you or do you qualify for disability benefits? Yes No

If yes, what is your disability? _____

Have you previously registered CRA *Form T2201* to claim your disability amount? Yes No

Have you received any Covid benefits in the last year? Yes No

Would you like a printed copy of your Tax Return Summary? Yes No

Pick up of tax documentation are Wednesdays from 10am – 2pm.

Donations are kindly accepted to assist in covering program costs.