

# Community Volunteer Income Tax Program

## Client Information & Checklist – Please Fill in Completely

Have you had your taxes done by Deltassist in the past?  Yes  No

If No, how did you hear about us? \_\_\_\_\_

Is this the first time you are filing income tax?  Yes  No

Are you filing for 2023 only  Yes  No - If No, what additional years? \_\_\_\_\_

Name: \_\_\_\_\_  Male  Female

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email Address: \_\_\_\_\_

What province did you live in on December 31, 2023 \_\_\_\_\_

Marital Status as of December 31, 2023:  Single  Married  Common-law  Separated  
 Divorced  Widowed

Did your marital status change last year? If yes, when? \_\_\_\_\_

Social Insurance Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_  
Day / Month / Year

Canadian Citizen  Yes  No Language:  English  French  Other: \_\_\_\_\_

Update Elections Canada with the contact information above?  Yes  No

Have you been approved for the federal disability tax credit (filed form T2201)?  Yes  No

If yes, please indicate type of disability: \_\_\_\_\_

If you have recently moved to Canada, please provide the date of your move, your income from outside countries and from which country? \_\_\_\_\_

Do you own property worth more than \$100,000 outside of Canada?  Yes  No

Did you sell a property in Canada during 2023?  Yes  No

If yes, was this property your principle residence?  Yes  No

Flip page over 

**Spousal Information** (if applicable)

Social Insurance Number: \_\_\_\_\_

Name: \_\_\_\_\_  Male  Female

Date of Birth: \_\_\_\_\_  
Day / Month / Year

Address:  Same or: City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Spouse's Total Income, earned in Canada in 2023 \$ \_\_\_\_\_

**Dependants: How many children born in 2005 or later?** \_\_\_\_\_

**Children/Dependent Information** (if applicable)

Social Insurance Number: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship to you: \_\_\_\_\_

Date of Birth: \_\_\_\_\_  
Day / Month / Year

Address:  Same or: City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Income:  \$0 or: \$ \_\_\_\_\_

Marital status:  Single  Married  Common-law  Separated  Divorced  Widow

Have they been approved for the federal disability tax credit (filed form T2201)?  Yes  No

If yes, please indicate type of disability: \_\_\_\_\_

**Children/Dependent Information** (if applicable)

Social Insurance Number: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship to you: \_\_\_\_\_

Date of Birth: \_\_\_\_\_  
Day / Month / Year

Address:  Same or: City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Income:  \$0 or: \$ \_\_\_\_\_

Marital status:  Single  Married  Common-law  Separated  Divorced  Widow

Have they been approved for the federal disability tax credit (filed form T2201)?  Yes  No

If yes, please indicate type of disability: \_\_\_\_\_

**If you need more space to list dependents, please ask for another form.**

**Please put all your tax slips from 2023 and your 2022 Notice of Assessment into the envelope.**

**Thank you!**

# Community Volunteer Income Tax Program

## Client Information & Checklist – Please Fill in Completely

Starting in the 2023 tax year, a renter's tax credit based on annual income has been introduced in British Columbia.

For 2023 this tax credit will give \$400 to low- and moderate-income renter individuals and families with an adjusted income of \$60,000 or less. Individuals and families with an adjusted income greater than \$60,000 and less than \$80,000 may receive a reduced amount.

Full rental address if different than current one:

\_\_\_\_\_

Number of months of tenancy at this address: \_\_\_\_\_

Total rent paid at this address for 2023: \_\_\_\_\_

Name of landlord or company payment was made to:

\_\_\_\_\_

Full secondary rental address if more than one in 2023:

\_\_\_\_\_

Number of months of tenancy at this address: \_\_\_\_\_

Total rent paid at this address for 2023: \_\_\_\_\_

Name of landlord or company payment was made to:

\_\_\_\_\_