**INCOME TAX APPOINTMENTS INFORMATION**

**Do you live in *North Delta – or South Delta*?**

* **Have you had your taxes prepared by us before?**

* **Are you on low-income?**
  + 1 person up to $35,000
  + 2 persons up to $45,000
  + 3 persons up to $47,500
  + 4 persons up to $50,000
  + 5 persons up to $52,500
  + More then 5 persons $52,500 plus $2,500 for each additional person o Interest income less than $1,000

* **Is the appointment just for yourself, or for another family member as well?** (if so, book one appointment slot for each person)

* **Is your tax return for this taxation year only (2019) - or for other previous years as well** (if so, book one appointment slot for each year)

* **Is this a simple personal return only?**

In general, your tax situation is simple if you have no income or if your income comes from these sources:

Employment

Pension

Benefits such as Canada Pension Plan, disability, employment insurance, social assistance

Registered retirement savings plans (RRSP's)

Support payments

Scholarships, fellowships, bursaries or grants

Interest (under $1,000)

Your tax situation is not simple if you:

Are self-employed or have employment expenses

Have business or rental income and expenses

Have capital gains or losses

Filed for bankruptcy

Are completing a tax return for a deceased person

* **Do you have all your required documentation?** 
  + Income statements (T4, T5 etc.)o Medical or dental receiptso Donation, tuition, bus pass receiptso Last year’s return or notice of assessment
* **Will you be claiming for dependent children or grandchildren?** 
  + If so, be sure to have Social Insurance Number for each dependent
* **If for any reason, you cannot make your appointment, please be sure to contact us.**