

# Community Volunteer Income Tax Program

*Funded by the Canada Revenue Agency*

## **Document Drop-Off Procedure**

- Make sure you meet the income criteria listed below.
- Fill out Part A, B and D (Highlighted) of the Authorization Form (TIS60 E).
- Fill out the bottom of this letter. The volunteers need this information to file your return.
- Secure all documents in the attached (or any other) envelope:  
any T4s or Old Age- or Canada Pension forms you have received / medical receipts (Add them up please!) / investment receipts / charity receipts.  
0 I have no documents -> tax year to be filed: \_\_\_\_\_
- Include \$1 or \$2 for the stationary involved on our part (VOLUNTARY).
- Drop your sealed envelope at our office (715 7<sup>th</sup> Street Keremeos).
- The volunteer preparing your return will give you a call only if there is a problem filing your return. Your documents will be mailed back to the address on your documents.

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Marital Status: \_\_\_\_\_

Phone Number: \_\_\_\_\_

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

Do you receive Disability Assistance? 0 Yes 0 No

Do you have Dependents? 0 Yes 0 No

If yes, please provide their Names & Birthdates:

\_\_\_\_\_

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*Please contact me if you have any questions or concerns.*

### **Lisa Flex**

Volunteer & Senior Service Coordinator

250 499 2352 Ext. 101

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To qualify for this service, you must meet the following criteria:

Single person	Annual income less than \$35,000
Couple	Annual income less than \$45,000
Adult with Child	Annual income less than \$45,000
Each Additional Dependent	add \$ 2,500
Interest income cannot exceed \$1000	

- Lower Similkameen Community Services Society -



## Community Volunteer Income Tax Program Taxpayer Authorization

**Protected B**  
when completed

Tax year 20
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**Keep this form for your records. Do not send a copy to the Canada Revenue Agency (CRA).**

- Complete **Section I** to allow a Community Volunteer Income Tax Program (CVITP) volunteer to prepare your income tax and benefit return.
- Complete **Section II** if you would like your return to be electronically filed. The CVITP volunteer must complete parts **E** and **F**.
- Keep all records used to prepare your return for a period of six years, and provide this information to the CRA on request.
- The CRA is responsible for ensuring the confidentiality of your electronically filed tax information **only** after the CRA has accepted it.

### Section I – Authorization

#### Part A – Identification

Last name		First name			Social insurance number <small>(only enter last 3 digits)</small>		
					x   x   x   x   x   x		
Mailing address: Apt. No. – Street No. Street name				Telephone number (home)		Telephone number (work)	
P.O. Box	R.R.	City		Prov./Terr.	Postal code		

#### Part B – 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.

\_\_\_\_\_  
Signature (individual identified in Part A)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signed at (place and name of organization)

### Section II – Electronic filing (EFILE)

#### Part C – Declaration

Enter the following amounts from your income tax return:

Total income (line 150) .....	_____	Refund (line 484) .....	_____
Taxable income (line 260) .....	_____	<b>or</b>	
Total federal non-refundable tax credits (line 350 of Schedule 1) .....	_____	Balance owing (line 485) .....	_____

#### Part D – Declaration and authorization

I declare that the information entered in Part A and the amounts shown in Part C above are correct and complete, and fully discloses my income from all sources. I also declare that I have read the information above, and the electronic filer identified in Part E is electronically filing my income tax and benefit return.

\_\_\_\_\_  
Signature (individual identified in Part A)

\_\_\_\_\_  
Date

### CVITP volunteer must complete parts E and F

#### Part E – Electronic filer identification

By signing Part D above, the individual in Part A declares that the following person or organization is electronically filing his or her income tax return. Part D **must be signed** before the return is electronically transmitted.

Name of person or organization: \_\_\_\_\_

Electronic filer number: \_\_\_\_\_

#### Part F – Document control number

Document control number for the electronic record of the individual's return:

\_\_\_\_\_

**We're here to help!**

If you need more information on your tax refund or your tax return, or if you have a service complaint, go to [canada.ca/cra-contact](http://canada.ca/cra-contact) or call 1-800-959-8281.

Personal information is described in Personal Information Bank CRA PPU 100. Under the Privacy Act, individuals have a right to have their personal information protected. They also have the right to access, correct or notate this information and to file a complaint with the Privacy Commissioner of Canada regarding our handling of their information.