

Income Tax 2025 - Intake Form

Important: Your income tax will not be filed until you come to the MSA office to sign for it.

Volunteers **DO NOT** complete Individual Income Tax Returns for the following situations: deceased person, business or rental income, employment expenses, capital gains/losses, or for income over \$35,000 for families or \$25,000 for an individual.

Your information

Your information should agree with the information provided to Service Canada.

Name: _____
Last Name First Name Middle Name

SIN: _____ Date of birth (d/m/y): _____

Are you a Canadian citizen? Yes _____ No _____

Current mailing address:

Apartment/Unit number Street number Street name

City: _____ Province: _____ Postal code: _____

Phone: _____ Email: _____

Please select your marital status:

Married ___ Common Law ___ Widowed ___ Separated ___ Single ___ Divorced ___

On December 31, 2024, which province or Territory were you living in? _____

Did you immigrate to Canada in 2024? Yes ___ No ___

If yes:

- What is your date of entry (d/m/y)? _____
- Please indicate income earned before entry to Canada (in Canadian dollars) _____

Did you pay rent in 2024? Yes ___ No ___

Amount per month \$ _____ How many months? _____

Landlord name: _____

Your spouse's information

Name: _____
Last Name First Name Middle Initial

SIN: _____ Date of birth (d/m/y): _____

Is your spouse a Canadian citizen? Yes _____ No _____

Is your spouse living in Canada with you? Yes _____ No _____

If you answered 'Yes', we would need your spouse's tax information to complete the spouse's return. If you answered 'No', we would need your spouse's net income earned for 2024 in Canadian \$_____.

Your dependent's information (children under 18 years old)

Last name	First name	Date of birth (d/m/y)

Direct Deposit Information

Bank number _____ Transit number _____ Account number _____

General Information

To ensure that your return is completed promptly and accurately, please verify that you have all the necessary information below that applies to your situation.

Information Slips

- T4 - Salary and wages
- T4A, T5, T3 - Pension, annuity, and investment income, Canada/Ontario savings bonds
- T4E - Employment insurance benefits
- T5007 - Social assistance payments/ Worker's compensation benefits

Receipts for expenses and credits (Please total each deduction before dropping off)

- Childcare expenses and a completed T778, if you have one
- Union dues
- Tuition fees and education amount (T2202)
- Medical expenses (Please make a list and add up all of the receipts to help the preparer)
- Charitable/political donations (Please make a list and add up all of the receipts to help the preparer)
- All property taxes or rent paid (Please make a list and add up all of the receipts to help the preparer)

Signature

I understand that a CRA-CVITP Registered Volunteer will be preparing my income tax return based on the information I have provided. I further understand and agree that the volunteer of the office where the service is provided are not accountants and I agree they will not be held responsible or liable, financially or otherwise, for any errors or omissions that may occur in the preparation of my tax return.

Signature _____ Date _____