

COMMUNITY VOLUNTEER INCOME TAX PROGRAM—INTAKE FORM

Information provided is anonymous and used for evaluation and statistical purposes

CVITP LOCATION: _____

Basic Information:

1. Gender: ☐ Female ☐ Male ☐ _____
2. Date of Birth: DAY/MONTH/YEAR Current Age: _____
3. Province of Residence on December 31, 2016: _____
4. Marital Status—As of December 31, 2016:
☐ Single (never before married or common-law) ☐ Widowed
☐ Separated/Divorced ☐ Married/Common-law (filing separately)
Did your Marital Status Change in the year? ☐ Yes ☐ No
If 'YES' what is the date of change?: DAY/MONTH/YEAR
5. Residency Status: ☐ Canadian Citizen ☐ Permanent Resident
☐ Temporary Resident ☐ First Nation/Metis/Inuit ☐ Refugee
6. Did you move to Canada in 2016?:
☐ Yes—Arrival Date: DAY/MONTH/YEAR
7. Main Source of Income: ☐ Employment ☐ Pension
☐ EIA (Social Assistance) ☐ Employment Insurance (EI)
☐ WCB ☐ No Income ☐ Other: _____
8. If you have children, how many who are under 18 years old (as of Dec 31/16) live with you? _____
9. Do you or a child in your care have a long term mental or physical disability that requires support? ☐ Yes ☐ No
10. Your housing situation (tick all that apply): ☐ Getting MB Rent Assist
☐ I live in MB Housing ☐ My rent is based on my income
☐ Rent on my own (or with spouse/kids) ☐ Rent with roommate
☐ Room & Board ☐ Living in a hotel ☐ I don't pay any rent
☐ Own my home & pay property taxes ☐ Other: _____
11. Are you a student in post secondary school? ☐ Yes

ONLY TICK BENEFITS APPLIED FOR OR TO BE APPLIED FOR:

Seniors—Ask about Seniors Benefits:

- ◇ 55 Plus supplement
- ◇ School tax assistance for tenants 55+ (can apply for past 4 years)
- ◇ Spousal allowance/Allowance for the survivor
- ◇ Guaranteed income supplement

Families— Ask About:

- ◇ Canada Child Benefit—(including additional benefits for disabled children)
- ◇ Expecting a Baby? Ask about the **Manitoba Prenatal Benefit**
- ◇ Low income but NOT ON EIA? Ask about the **Manitoba Child Benefit Program**
- ◇ Canada Education Savings Program (CESP) - get help from the Government to save for your child's education

Dealing with a Disability? Ask About:

- ◇ Disability Tax Credit
- ◇ Primary Caregiver Tax Credit
- ◇ Manitoba Pharmacare
- ◇ Registered Disability Savings Plan

Housing Benefits—Ask About:

Tenants who DO NOT live in subsidized housing and DO NOT receive EIA

- ◇ Manitoba Non-EIA Rent Assist Program

Post Secondary Students? Ask About:

- ◇ MB Tuition Fee Income Tax Rebate Advance

TAX INFORMATION: Filled out by the Volunteer Tax Preparer:

Income for 2016: Total income (Line 150): _____

Net Income (Line 236): _____

SENIORS BENEFITS:

55 PLUS—A Manitoba Program that provides a financial supplement to low-income seniors 55 years or older. SENIORS RECEIVING MONTHLY BENEFITS FROM EMPLOYMENT AND INCOME ASSISTANCE ARE NOT ELIGIBLE. Benefits are paid quarterly in late April, July, October, January based on the income shown on the last tax return. Maximum quarterly amount is **\$161.80** for a single person and **\$173.90** to each eligible person in a married or common-law relationship. Partial benefits are available to single people with an annual income up to **\$9,746.40** and couples with an annual family income up to **\$16,255.20**.

School Tax Assistance for Tenants 55+ (STAT 55+) - annual rebate of up to **\$175** to offset the school tax portion of rent costs. Tenant must be over 55, have an income of less than **\$23800**, have claimed rent on tax return and **must not** live in a non-profit seniors housing facility (as these facilities do not pay school taxes). NOT FOR RESIDENTS OF MANITOBA HOUSING FACILITIES.

Spousal Allowance/Allowance for the Survivor—Extra benefits paid to a **60-64 year old** spouse or common-law partner of an OAS recipient or to a survivor. Monthly amount depends on the yearly household income reported on tax returns.

FAMILY BENEFITS:

Canada Child Benefit—Monthly payments to help support your children. Must complete an application **RC66-Canada Child Benefits**. Temporary residents must live in Canada for 18 months to be eligible. Benefits based on family income with maximum of \$6400/yr for kids under 6 & \$5400/yr for kids 6-17. Benefits decrease as family income exceeds \$30000. Disabled children get extra benefits of up to \$2730

Manitoba Prenatal Benefit - a financial benefit that helps women buy healthy food in the 2nd and 3rd trimester of pregnancy. To qualify, must be pregnant, live in Manitoba and have a family income under \$32000.00

Manitoba Child Benefit Program—a monthly supplement to help low income families who DO NOT receive any EIA benefits. Also provides help with some of the costs of children's prescription eyeglasses

Canada Education Savings Program (CESP) - get help from the Government to save for your child's education when you open a NO COST Registered Education Savings Plan (RESP) account for your child and apply for the CESP. Eligible families get \$500 FREE for opening an account and \$100 per year with no contributions PLUS up to \$700 a year in matching contributions.

- For more information visit www.smartsaver.org or call 1-800-622-6232. Only sign up with a major financial institution

DISABILITY AND HEALTH ISSUES:

Disability Tax Credit—This tax credit can reduce your taxes or be transferred to a spouse/partner to reduce theirs. Canada Revenue must approve this credit before you can make a claim. Medical details about your disability must be provided by your health care provider on the CRA form T2200

Primary Caregiver Tax Credit—A refundable credit for people providing on going voluntary care and support to family members, friends or neighbours who require help in their home. Application must be completed by the health care provider and verified by the regional health authority before the claim can be made on a tax return.

Manitoba Pharmacare—a drug program for all Manitobans regardless of age whose income is affected by high drug costs. Pharmacare coverage is based on total family income and the amount you pay for prescription drugs. Annual deductible is based on income from two tax years prior. If there has been a significant change in your income, the deductible can be recalculated based on current income by completing a 'projected income worksheet' and submitting to the Pharmacare program for review.

Registered Disability Savings Program (RDSP) This program allows you to save for the future without losing any of your EIA-D benefits.

HOUSING BENEFITS:

Rent Assist (Non-EIA) Program— A monthly shelter-related financial benefit to help low income Manitobans (Cdn Citizens or permanent residents) who pay rent in the private market and are required to spend a large portion of their income on rent. The monthly benefit will vary depending on annual income shown on the tax return of each adult living in the home. Only one Rent Assist benefit per address.

POST SECONDARY STUDENTS:

Manitoba Tuition Fee Income Tax Rebate Advance—If you live in Manitoba and attend a post-secondary institution, you are now eligible to receive a 5% tax credit **advance** on your tuition fees while you're still going to school. There is an annual credit cap of \$500 in 2016, and a lifetime cap of \$5,000 under the advance. Amounts claimed as an advance will reduce the Manitoba Tuition Fee Income Tax Rebate earned following graduation. The tax credit is claimable by a student even if the federal and provincial tuition and education amounts are trans-