

Income Tax Service for Low-Income Seniors and Adults with Disabilities 2023 Tax Year

You qualify to have your taxes completed by Drop-Off if you live in **Ontario** and:

- Your 2023 income tax return has not yet been filed with CRA
- You were born in 1969 or earlier, or you are an adult with a disability
- Single, separated or divorced person: your 2023 total income was **\$38,000** or less
- Married or common-law couple: your combined 2023 total income was **\$55,000** or less
- You did **NOT** have income from capital gains, rental income from a property you own, or income from a business you own, and you were not self-employed
- You are not bankrupt.

INSTRUCTIONS

1. Fill in the **FORM** on the back of this page. **PLEASE PRINT.** You must complete every section of the form and sign it at the bottom, or we will not be able to do your tax return. We need **a separate copy of this form** completed and signed by **each** person in a couple and **each** dependant who needs to file a 2023 tax return. **Note:** There are additional blank forms in the black mailbox beside the door at The Olde Forge.
2. Put the **completed form** and your 2023 tax documents into an envelope or a Ziplock bag, including:
 - **T-slips** for 2023, e.g. T4, T4A, T4A OAS, T4A CPP, T5007, T4RIF, T4E, T5007, T3, T5
 - **Documents for other income** in 2023, e.g. foreign pensions
 - **Rent Receipt(s)** for your total rent in 2023 if you did NOT live in Ottawa Community Housing

Note: If you live in Ottawa Community Housing, your rent cannot be claimed for the Trillium Benefit because OCH does not pay municipal taxes, so no receipt is required

 - **Final 2023 Property Tax Bill**, if you own the house or condo you live in
 - **Receipts for medical expenses, donations to charities, political contributions or digital media subscriptions** (with an QCJO number on the receipt) in 2023

Note: If you were 70 or over in 2023, you should be eligible for a tax refund credit for medical expenses through the Ontario Seniors Care at Home Tax Credit. Please submit all your receipts for expenses such as: prescriptions, dental, vision, hearing care, therapy, bathroom aids, etc.

 - **OC Transpo / Para Transpo receipts**, if you were 65 or older on **Dec. 31, 2022**.
 - Income Tax Return for 2022, if you have it.
3. **Married and common-law couples must file their income taxes together.** Put the completed forms and tax documents for the taxpayer(s) and dependants into **one** envelope.
4. Put the sealed envelope / Ziplock through the **slot in the door** at **The Olde Forge, 2730 Carling Ave.** Do not come into the building to drop off your documents.

A volunteer will prepare and file your return electronically. Your Notice of Assessment will be mailed to you from CRA. The Olde Forge will mail your tax documents back to you, along with a summary of your 2023 return. Please notify The Olde Forge if your CRA assessment states your return has been adjusted.

THE OLDE FORGE

2023 INCOME TAX DROP-OFF FORM

IMPORTANT: Please complete **every section** of this form and **SIGN** at the bottom

First Name		Last Name	
Date of Birth day ____ / month ____ / year ____			
Language <input type="checkbox"/> English <input type="checkbox"/> French		Social Insurance Number (SIN) ____	
Phone number		E-mail	
Address		Has your address changed since your 2022 tax return was filed? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Postal Code		If Yes, have you advised CRA? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Current Marital Status (check one) <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Common-Law <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced <input type="checkbox"/> Separated		Did your Marital Status change in 2023? <input type="checkbox"/> Yes <input type="checkbox"/> No If YES, on what date? ____	
Are you filing taxes in Canada for the first time?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Do you own foreign assets valued at over \$100,000?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Did you sell your principal residence in 2023?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Do you have medical expenses, charitable donations or political contributions to claim? If YES, attach receipts		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Note: If you were 70 or over in 2023 , submit all your medical receipts to claim a <u>refundable credit</u> .			
Are you a Canadian Citizen?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
If YES, may Elections Canada put your name on the Voters List?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Do you live in Ottawa Community Housing? <input type="checkbox"/> Yes <input type="checkbox"/> No			
If Yes : You cannot claim your rent for calculation of the Trillium Benefit. See Note on pg 1			
If No : Total rent paid for all of 2023 \$ ____ Attach rent receipt			
Name of person or company you paid rent to in 2023: ____			
NOTE: If you moved during 2023: Attach a sheet with the other addresses, the dates you lived there in 2023, the total rent paid and the name of the landlord at each address			
If you own your home: municipal tax paid in 2023? \$ ____ attach FINAL property tax bill or receipt			
If over 65, how much did you pay for Public Transit or ParaTranspo in 2023? \$ ____ attach receipts			
Amount paid for a digital news subscription with a QCJO number for 2023 \$ ____ attach receipt			
If you have a disability, has CRA approved you for the Disability Tax Credit form T2201) <input type="checkbox"/> Yes <input type="checkbox"/> No			
Did The Olde Forge prepare your 2022 Tax Return?		<input type="checkbox"/> Yes <input type="checkbox"/> No	

CRA ACCESS AUTHORIZATION

I am the Taxpayer or legal representative for this taxpayer.

(please print) _____

Name of Taxpayer or Legal representative **Signee's Telephone Number**

Certification By signing and dating this page I authorize the Canada Revenue Agency to interact with The Olde Forge CVITP volunteer preparing my taxes until such time as my 2023 tax return is filed.

SIGNATURE of Taxpayer or Legal representative **DATE of signature**