

CPA NB Virtual Tax Clinics

Process

Please **fill out the online form** at cpanewbrunswick.ca to confirm your eligibility to participate. By submitting your information you give the volunteer permission to efile on your behalf.

You will be contacted within seven business days by a volunteer to set a mutually agreeable time to go through the tax filing questions (more below).

You will be asked to send clear pictures or scans via secure email of the following:

- picture ID (front & back)
- tax [slips](#) (see also list below)
- Notice of Assessment from 2022 tax return, if available
- First and last name - Did your name change since your last return?
- The TIS60 form, which can be found on the [CRA website](#)

The volunteers commit to deleting any emails containing your personal information once your return is filed.

Preparing for the Call

You do not need to answer these questions in advance, but this will give you an idea of what information the volunteer will need to know to file your return.

- Social Insurance number
- **Date of birth **this should be provided verbally** during your call with the volunteer, so it is **not** included in an email that also contains your SIN number
- Province of residence on December 31, 2023
- Marital status
- Did your marital status change in 2023? If so, provide the date
- Has there been a change in eligible dependent as a result of marital status change?
- Current mailing address, if different from T4 slip
- If your province of residence has changed, date of move
- Is home address the same as mailing address?
- Current province of residence if different from mailing address
- Telephone number
- Language of correspondence
- Is this your first return?
- Did you own foreign property in 2023 worth more than \$100,000 CDN?
- Did you sell a principal residence in 2023?
- Are you an officer or servant of another country, such as a diplomat?
- Do you have Canadian citizenship?
- Do you authorize CRA to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors? (to be included on the voters' list for Elections)
- Do you wish to provide an email address so that CRA can contact you?
- Do you wish to have your tax return Efiled?

- Do you have prior tax returns to file?
- Do you have income to report for 2023?
- Did you immigrate to Canada in 2023? If so, you will be asked to provide date of entry and any income earned while not a resident of Canada.
- Are you a Canadian resident with a spouse who immigrated to Canada in 2023?
- Did you leave Canada in 2023? If so, you will be asked for date of departure and any income earned while not a resident of Canada.
- Are you a non-resident?
- Were you in prison in 2023?
- Are you a Status Indian?

Income

- Examples of employment income slips – T4, T4E (Employment insurance)
- Social assistance slip – T5007
- COVID relief benefits (CERB, CESB) – T4A
- Pension income - T4OAS, T4A(P), T4A, T4RSP, T4RIF etc.
- Investment income – T3, T5, T5008
- Interest on a tax refund in 2022 (Notice of Assessment)

Employment benefits

- Did you pay any union dues or professional fees that are not included on a T slip?
- Did you have any employment expenses? T777

Deductions

- Tuition slips – T2202A, other tuition receipts, tuition credits to carry forward
- Student loan interest
- Moving expenses
- Medical expenses
- Disability tax benefit or attendant care expenses
- Caregiver amount
- Did you make any RRSP contributions?
- Alimony & support payments
- Child care expenses
- Did you pay any tax by installments?
- Did you receive a lump sum UCCB payment in 2023?
- Did you purchase a home in 2023? Do you have any home buyer's amount to claim?
- Did you withdraw any money from an RRSP for school or to purchase a home?