INCOME TAX ASSISTANCE
VOLUNTEER PROGRAM SINCE 1988

Information Sheet

Important: This information is confidential.

If you or your spouse sold a residence (including a cottage) in 2024, **you are not eligible** for the Income Tax Assistance – Volunteer Program (ITAVP). Contact the Canada Revenue Agency (CRA) or Revenu Québec to find out how to report the sale. This sheet must be returned to you with your documents, including the copies of your income tax returns, form TIS60, *Community Volunteer Income Tax Program Taxpayer Authorization*, form TP-1000.PB-V, *Authorization to Complete and File a Personal Income Tax Return Online*, information slips and RL slips.

Information sheet received on: Y Y Y Y M M D D

1 General information

First name

Last name

Sex ☐ M ☐ F

Social insurance number (SIN)

Date of birth Y Y Y Y M M D D

Province of residence on December 31, 2024

Marital status on December 31, 2024: ☐ Single ☐ Separated ☐ Divorced ☐ Widowed ☐ Married ☐ Common-law spouse

If your marital status changed in 2024, how did it change? Enter the date the change occurred (for example, you got divorced on June 15).

Current address

Street number, street name, apt., or PO Box

City, town or municipality

Province

Postal code

Area code Phone (home)

Area code Phone (work)

Extension

Language of communication ☐ French ☐ English

Is this your first federal income tax return? ☐ Yes ☐ No

Are you a Canadian citizen? ☐ Yes ☐ No

Do you authorize the CRA to provide your name, address, date of birth and citizenship information to Elections Canada? ☐ Yes ☐ No

Do you want to receive CRA correspondence by email and stop receiving it by regular mail? ☐ Yes ☐ No

You must register for the CRA's My Account to view your correspondence.

Email address

Is this your first Québec income tax return? ☐ Yes ☐ No

Did you receive or use one or more cryptoassets? ☐ Yes ☐ No

If you want Revenu Québec to notify you of certain activity regarding your file, check how you would like to be notified: ☐ Text ☐ email ☐ Text **and** email

Do you want to receive correspondence from Revenu Québec in My Account only? ☐ Yes ☐ No

Throughout 2024, did you live **alone** or with one or more dependent children? ☐ Yes ☐ No

Are you claiming the solidarity tax credit? ☐ Yes ☐ No

If so, complete Part 3.

If you are eligible for the tax shield, who should it be paid to? ☐ You ☐ Your spouse ☐ My spouse and me

2 Québec prescription drug insurance

Did you not have to pay for your prescription drugs throughout the year because of the amount of the Guaranteed Income Supplement (GIS) you received? ☐ Yes ☐ No

Were you covered by a private prescription drug insurance plan in 2024? ☐ No ☐ Yes, my plan ☐ Yes, my spouse's or parent's plan

If applicable, specify how long (the entire year or certain months) you were covered by the plan.

☐ Entire year

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June ☐ July ☐ August ☐ September ☐ October ☐ November ☐ December

If you are exempt, check the box next to the reason:

☐ Last-resort financial assistance received
☐ Under 18 and unmarried
☐ Registered Indian
☐ Unmarried full-time student between 18 and 26
☐ In a CHSLD
☐ Immigrant or emigrant
☐ Other

3 Solidarity tax credit

If you had a spouse who was living with you on December 31, 2024, only one of you can claim the solidarity tax credit for your couple by completing this part. If your spouse did not live with you, each of you must complete this part to claim the solidarity tax credit.

If you had a spouse, were they living with you on December 31, 2024? ☐ Yes ☐ No ☐ N/A (no spouse)

Throughout 2024, did you live alone in a dwelling (e.g. a house or apartment) or did you live only with people under age 18? ☐ Yes ☐ No (spouse, co-tenant or children over 18)

Was your address on December 31, 2024, the same as your current address? ☐ Yes ☐ No

If not, enter your home address on December 31, 2024:

Street number, street name, apt., or PO Box | City, town or municipality | Province | Postal code

On December 31, 2024, were you or your spouse: ☐ Tenants ☐ Subtenants ☐ Owners ☐ Neither tenants nor owners

If you or your spouse was a tenant or subtenant (person whose name is on the lease), you should have received an RL-31 slip from your landlord. You must provide us with this slip.

If you or your spouse owned your residence, specify the owner and the roll number or cadastral designation ("numéro matricule" or "désignation cadastrale") shown on the municipal tax bill.

Owners | Roll number or cadastral designation

4 Tax data download services

The CRA and Revenu Québec each offer an optional and secure service for organizations and volunteers to download tax data in order to automatically fill in some parts of the income tax returns.

If the organization offers these services, do you want it to use them to fill in your income tax returns? ☐ Yes ☐ No

If "**Yes**," you must authorize the organization to use:

- the CRA's **Auto-fill my return** service by signing the *Authorization request – signature page*;
- Revenu Québec's **Tax Data Download** service by giving the organization your download code or signing form COM-1076.TD.A-V, *Authorization to Download Tax Data*.

5 Tax credit for home-support services for seniors (people 70 or over)

In 2024, did you receive advance payments of the tax credit for home-support services for seniors (shown on an RL-19 slip)? ☐ Yes ☐ No

Was your family situation the same throughout 2024 (for example, for the entire year, you either had a spouse or you did not)? ☐ Yes ☐ No

Did you live in the same dwelling throughout 2024? ☐ Yes ☐ No

Place of residence in 2024:

☐ Your own home or a health establishment
☐ Apartment building (other than a private seniors' residence)
☐ Private seniors' residence
☐ Condominium

If you lived in an apartment building (other than a private seniors' residence), provide the following information:

Rent for January 2024 | Rent for December 2024 | Month rent changed, if applicable

If you lived in your own home, an apartment building (other than a private seniors' residence) or a condominium, did you pay for home-support services not included in your rent or condominium fees? ☐ Yes ☐ No

If "**Yes**," specify the type of services (you must provide receipts):

Check the appropriate box for yourself and, if you are claiming the credit on behalf of your couple, for your spouse on December 31. If you check the "Dependent" box, enter the date you or your spouse became dependent.

You: ☐ Non-dependent ☐ Dependent Y Y Y Y M M D D

Your spouse: ☐ Non-dependent ☐ Dependent Y Y Y Y M M D D

6 Information about certain income and credits

Complete only the fields that apply to your situation.

Person who **paid** the medical expenses in 2024 that were not covered or refunded: ☐ You ☐ Your spouse ☐ Dependant

Total **deductible** amount paid:

Person who did not earn any income in 2024: ☐ You ☐ Your spouse

Person confined to a prison or similar institution in 2024: ☐ You ☐ Your spouse

If you or your spouse was confined, enter the period of confinement:

Person with an impairment: ☐ You ☐ Your spouse

Person with a severe impairment in mental or physical functions certified by a qualified practitioner (you must have previously provided forms T2201 and TP-752.0.14-V): ☐ You ☐ Your spouse

Person unable to live alone (based on form TP-752.0.14-V): ☐ You ☐ Your spouse

Person who wants to transfer the unused portion of their tuition fees: ☐ You ☐ Your spouse To whom?

Person who **received** support payments in 2024: ☐ You ☐ Your spouse

Total **taxable** amount received:

Person who **made** support payments in 2024: ☐ You ☐ Your spouse

Total **deductible** amount paid:

If you checked any of the boxes above, provide the following information about your former spouse:

First name | Last name | Social insurance number (SIN)

Address

Person claiming the tax credit for recent graduates working in remote resource regions: ☐ You ☐ Your spouse

Did you receive advance payments (as shown on the RL-19 slip or statement of payments) of the tax credit for childcare expenses, the tax credit for home-support services for seniors, the tax credits respecting the work premium or the Canada Workers Benefit in 2024? ☐ Yes ☐ No

Person with dependants who do not live with them: ☐ You ☐ Your spouse

If this situation applies to you or your spouse, provide the following information:

First and last names of the dependant	Relationship	Social insurance number (SIN)	Date of birth (YYYY-MM-DD)	Net income

7 Information about the people who lived with you in 2024 (other than your spouse)

	Person 1	Person 2	Person 3
First name			
Last name			
Date of birth (YYYY-MM-DD)			
Relationship to you (e.g. daughter, father, co-tenant)			
Is the person your dependant?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
If the person is your or your spouse's child, did you or your spouse have shared custody of the child?*	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
If "**Yes**," who is claiming the tax credits in respect of the child?*	☐ You ☐ Former spouse	☐ You ☐ Former spouse	☐ You ☐ Former spouse
Social insurance number (SIN)*			
Net income*			
Is the person enrolled in post-secondary studies?*	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
If "**Yes**," a volunteer may contact you for more information.			
Date on which you began living together (YYYY-MM-DD)			
Date on which you stopped living together (YYYY-MM-DD)			
Is the person an owner or a tenant of the dwelling?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Does the person have an impairment?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
If "**Yes**," answer the following questions:			
Is the impairment a severe and prolonged impairment in mental or physical functions certified by a qualified practitioner (you must have previously provided forms T2201 and TP-752.0.14-V)?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Is the person unable to live alone (based on form TP-752.0.14-V)?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

* Provide this information if you are claiming a tax credit for this person.

8 Information about new residents

If you arrived in Canada in 2024, enter:

a) Your date of arrival: Y Y Y Y M M D D

b) Your status as a new resident: ☐ Immigrant ☐ Foreign student ☐ Other (specify):

c) The income you earned from January 1 to your date of arrival (in Canadian dollars) and the type of income:

d) The country where the income was earned:

If **your spouse** arrived in Canada in 2024, enter:

a) Their date of arrival: Y Y Y Y M M D D

b) Their status as a new resident: ☐ Immigrant ☐ Foreign student ☐ Other (specify):

c) The income they earned from January 1 to the date of their arrival (in Canadian dollars) and the type of income:

d) The country where the income was earned:

9 Information about your spouse

First name

Last name

Sex ☐ M ☐ F

Social insurance number (SIN)

Date of birth Y Y Y Y M M D D

Area code Phone

Is this your spouse's first federal income tax return? ☐ Yes ☐ No

Language of communication: ☐ French ☐ English

Status in Canada: ☐ Canadian citizen ☐ Permanent resident ☐ Refugee ☐ Other (specify):

Does your spouse authorize the CRA to provide their name, address, date of birth and citizenship information to Elections Canada? ☐ Yes ☐ No

Is this your spouse's first Québec income tax return? ☐ Yes ☐ No

Does your spouse want to receive CRA correspondence by email and stop receiving it by regular mail? ☐ Yes ☐ No

Email address

Did your spouse receive or use one or more cryptoassets? ☐ Yes ☐ No

If your spouse wants Revenu Québec to notify them of certain activity regarding their file, check how they would like to be notified: ☐ Text ☐ email ☐ Text **and** email

Does your spouse want to receive correspondence from Revenu Québec in My Account only? ☐ Yes ☐ No

Notes