

2021 Volunteer Income Tax Clinics

Central Okanagan

KELOWNA CLINICS

Name & Location	Eligibility	2021 Dates	Details
KCR Community Resources 620 Leon Avenue PHONE: 250.763.8008 ext. 253 EMAIL: csvolunteer@kcr.ca	<i>For all</i>	Virtual Clinic: On-going Drop-off/Pick-up & In-Person: Monday, Wednesday, Friday	<ul style="list-style-type: none"> • Appointments required for in-person clinic or drop-off/pick-up • Virtual clinic available • Tax years 2019 or older
Seniors Outreach & Resource Centre #115-2065 Benvoulin Court PHONE: 250.861.6180 EMAIL: cspltd2021@gmail.com or soss_projects@seniorsoutreach.ca	<i>Low/Moderate Income Seniors 60+years</i>	Every Wednesday 10:00 am - 3:00 pm February 17 – April 30, 2021	<ul style="list-style-type: none"> • Call or email for drop-off appointment • Completed taxes will be mailed back approximately 3-4 weeks after drop-off • Will not serve clients that exceed the suggested income • Use the main/front entrance
Ki-Low-Na Friendship Society 442 Leon Avenue PHONE: 250.763.4905 ext. 215 EMAIL: taxdisability@kfs.bc.ca	<i>Individuals w/ disabilities & Indigenous Peoples prioritized</i>	On-going	<ul style="list-style-type: none"> • Email/call and leave a message for information on tax preparation • 2010-2020 tax years
Bookkeeping & Tax Services Anita Hardy PHONE: 250.801.9479 EMAIL: anitahardycpa@gmail.com	<i>Low-income individuals</i>	On-going	<ul style="list-style-type: none"> • Contact by phone Wed & Fri 7:30 am-9:30 am or email anytime • Current year and back taxes assistance available
Virtual Clinic Leona & David Hawker PHONE: 778.478.6317 or 778.581.0317 EMAIL: leona2@shaw.ca	<i>Persons w/disabilities, Seniors, Students, Low- income</i>	Monday - Friday 9:00 am - 5:00 pm March 15 - December 31, 2021	<ul style="list-style-type: none"> • Appointments required to drop off tax returns, tax slips & receipts • Government-issued photo ID required • House visits for housebound clients • Closed during holidays

KELOWNA CLINIC (CONT)

Name & Location	Eligibility	2021 Dates	Details
First United Church 721 Bernard Avenue PHONE: 250.762.3311	<i>For all</i>	Tuesday & Thursday 10:00 am - 11:00 am March 2 - April 27, 2021	<ul style="list-style-type: none"> • Use entrance off of Richter Street • Church staff will forward contact information to the volunteer to arrange a telephone consultation during Tuesday & Thursday outreach

WEST KELOWNA CLINIC

Westside Health Network Society PHONE: 250.768.3305 EMAIL: whns@telus.net www.westsidehealthnetwork.org	<i>Low-income individuals</i>	Monday - Friday 8:00 am - 2:00 pm	<ul style="list-style-type: none"> • All tax consultations will be completed via telephone • Information will be forwarded to a tax service volunteer for follow-up
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LAKE COUNTRY CLINIC

Lake Country Health Planning Society 10080 Main Street PHONE: 778.215.5247 EMAIL: office@lakecountryhealth.ca	<i>Low-income, Seniors, People with Disabilities, Immigrants</i>	Monday - Thursday 9:00 am - 4:30 pm March 15 - April 30, 2021	<ul style="list-style-type: none"> • Tax clinic offered by drop off and pick up by appointment, due to COVID • Masks and sanitizer available
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PEACHLAND CLINIC

Peachland Wellness Centre 4426 5th Street PHONE: 250.767.0141 EMAIL: wellnesscentre@shaw.ca	<i>For all</i>	Tuesday 9:00 am - 3:00 pm March 2 - April 27, 2021	<ul style="list-style-type: none"> • By appointment only, NO walk-ins • Masks are required and social distancing will be in place • time slots will be scheduled to drop off tax information and answer basic questions, further conversations will take place over the phone
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LOW COST SERVICE

Amanda Zais, DFA The Tax Pros Income Tax Service Orchard Park Mall (between La Senza & Fortuna Gelato) PHONE: 250.762.8206 www.thetaxprosonline.com	<i>Low cost tax service available online or in-person</i>	No appointment during tax season Low cost rate at Orchard Park Mall location or online ONLY	<ul style="list-style-type: none"> • \$30/tax return for those with less than \$20,000 yearly income • Basic returns, PWD, CPP/OAS • No investments income, self-employment or special deductions/credits (besides disability) • 20% off for seniors 65+ with complex returns
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ELIGIBILITY CRITERIA FROM THE CANADA REVENUE AGENCY WEBSITE.

These suggested maximum income levels should serve as a guideline only. See the listings above for additional details.

Community organizations have the flexibility to adjust or set eligibility criteria for tax filers based on the local economic environment, the population they serve, and their own capacity.

In general, your tax situation is simple if you have a modest income or if your income comes from these sources:

- employment
- pension
- benefits such as CPP, disability, CCB, EI, social assistance
- RRSP
- support payments
- scholarships, fellowships, bursaries or grants
- interest (under \$1,000)

Your tax situation **is not** simple if you:

- are self-employed or have employment expenses
- have businesses or rental income and expenses
- have capital gains or losses
- file for bankruptcy
- are completing a tax return for a deceased person

Exception: Taxpayers that have T4A income that shows as Self-Employed/Business in Box 48 may be eligible to have their returns completed under CVITP when the volunteer is comfortable in preparing a return with the T4A income and **all** the following conditions are met:

- total income in Box 48 is under \$1000
- no expenses are claimed
- have capital gains or losses
- taxpayer is not registered as a GST/HST registrant
- or required to be a GST/HST registrant

Suggested Income Level

Taxpayer status

Family income

- Single person **up to \$35,000**
- Couple **up to \$45,000** (add \$2,500 for each dependent)
- One adult with one dependent **up to \$37,500** (add \$2,500 for each additional dependent)

Documents to bring

- Copy of last year's Income Tax Return
- 2020 Tax Assessment
- Tax Forms
- Receipts
- 2020 Tax Slips