



Please complete all sections of this form and upload to the secure portal provided. Please Do Not Email this form.

Referring Agency: _____

Case Worker Name: _____ Case Worker Email: _____

Years you are filing for: _____

1. Personal Information:

First Name: _____ Last Name: _____ Date of Birth(dd-mm-yyyy): ____/____/____

Current Mailing Address:

Unit/Apt #: _____ Street #: _____ Street Name: _____ Postal Code: ____|____

Phone #: _____ SIN: ____/____/____

2. Partner (N/A if not applicable) Note: If you have a partner, please fill out even if we are not preparing their tax return.

Personal Information:

First Name: _____ Last Name: _____ Date of Birth(dd-mm-yyyy): ____/____/____

Current Mailing Address:

Unit/Apt. #: _____ Street #: _____ Street Name: _____ Postal Code: ____|____

Phone #: _____ SIN: ____/____/____

Net Income is needed even if we are not preparing partner's tax return: \$ _____

Do you have children or dependents? Yes [] No [] If yes, please complete the Dependents/Children Form

3. Rent Paid or Property Tax (N/A in fields that do not apply)

Year _____ Address: Unit/Apt #: _____ Street #: _____ Street Name: _____ Postal Code: ____|____

Total months at this address last year _____ Landlord's Name _____

Total rent you paid (if applicable) _____ Total property taxes you paid (if applicable) _____

*If you have property tax, please ensure you provide information regarding the municipal and education levies.

If you paid property tax and were 64 or older on Dec. 31 of the previous year, you could be eligible for the Ontario Senior Homeowners' Property Tax Grant. Would you like to apply? Yes [] No []

4. Status (select all that apply)

Citizenship Status: [] Canadian Citizen [] Permanent Resident [] Convention Refugee
[] Newcomer + Date of Arrival (dd-mm-yyyy): ____/____/____

Current Marital Status: [] Single [] Separated [] Divorced [] Widowed [] Married [] Common-Law

Did your Marital Status change during the year(s) which you are filing for? Yes [] No []

If yes, please provide the date of change (dd-mm-yyyy): ____/____/____

Do you have Aboriginal Status? Yes [] No []

Do you give Elections Canada permission to send you voter information? Yes [] No []

Do you own any foreign property worth \$100,000 or more? Yes [] No []

Did you sell your primary residence in the last year? Yes [] No []

Are you aware of any debt owing for previous years to the CRA or Family Responsibility Office (FRO)? Yes [] No []



5. Income (select all that apply)

- Income sources: Employment (T4), Pension(T4A), Old Age Security(T4OAS), WSIB, ODSP(T5007), OW / Social Assistance (T5007), Investment (T5/T3), CPP (T4A(P)), Other: _____

Please provide a copy of all tax slips for all income sources indicated above.

Did you receive any income from outside of Canada in the years being filed? Yes No
World income amount in CAD: \$ Country of origin:

6. Deductions (select all that apply)

- Deductions: Medical, RRSP, Donations, Tuition, Disability Amount, Childcare, Other: _____

Were you incarcerated during the year(s) you are filing for? Yes No

Do you have an approved Disability Form T2201 with CRA and are eligible to claim the Disability Tax Credit? Yes No

If you are eligible for the Ontario Trillium Benefit, would you like to receive the benefit:

- Monthly (from approx. July this year) Lump Sum next June (approx. 15 months wait)

6. Other Services

Do you have a My CRA Account? Yes No If no, would you like us to contact you for assistance? Yes No

Do you consent to being contacted in the future by SPRC Hamilton to complete a survey about your experience with tax filing to have a chance to win a \$25 grocery gift card? Please note, your participation is not required to receive tax help.

Yes No

Acknowledgement

- 1. Your income tax return will be completed by a volunteer registered with the Canada Revenue Agency (CRA) Community Volunteer Income Tax Program (CVITP) at the Social Planning and Research Council of Hamilton, Hamilton Financial Empowerment and Tax Help Program.
2. It is your responsibility to check your references for accuracy and completeness. Once filed, the Social Planning and Research Council of Hamilton, Hamilton Financial Empowerment and Tax Help Program does not keep copies of documents or receipts of any kind and will not be able to provide them to you at a later date.
3. It is your responsibility to ensure that all documents, receipts, and information shared with us is correct, truthful, and complete. All information provided is subject to review by the Canada Revenue Agency.
4. While volunteers are trained to support you with your income tax return(s), neither the organization or volunteers are able to ensure that the estimate given will be accurate or complete. Your final and accurate return will be provided by the Canada Revenue Agency. We hold no responsibility if the Canada Revenue Agency decides you have penalties or additional tax owing. Please note, we seek to support individuals in understanding and working through issues with the CRA so please make an appointment with a volunteer or financial empowerment worker if you have questions or concerns.

I hereby acknowledge that I have read and understood the above information.

Verbal consent received by worker OR Participant's Signature Date

Please take a moment to complete the following optional questions.

Why we ask these questions?

The Social Planning and Research Council Financial Empowerment and Tax Help Program collects non-identifying information to help us better understand the community we serve and report on program outcomes. The next few questions are requested by funders of this program and focus on housing needs. We know these questions can feel a bit personal, but your answers are kept private and are only shared as totals, never with your name. Taking part in this section is **completely optional** and will not impact your tax filing.

How this helps

By answering these questions, you are helping us and our funders understand community needs and the impact of this program. This information helps us improve our programs and show why year-round, free tax filing services are so important. Thanks for taking a few extra moments—your input truly makes a difference.

1. How did you find out about us? _____
2. Is this the first time you are accessing tax support with SPRC Hamilton? Yes No
3. Do you identify as being housing insecure (for example existing rent or utility arrears, or with an eviction notice, or currently in temporary housing) at the time of filing? Yes No
4. Do you plan to apply to social housing, or renew an existing social housing application or benefit? Yes No
5. Were you referred to or provided with information on the Tenant Support Program today? Yes No
6. Were you referred to other community supports today? Yes No
7. Which best describes your housing situation?
 Homeowner Tenant or Renter Staying with family or friends
 Living in emergency or transitional shelter Living unhoused with no fixed address Other housing situation
8. How long have you lived at your current housing address?
 Less than 6 months 6 months to a year 1 to 2 years 3 to 5 years More than 5 years
9. Will filing your taxes help you to keep your existing housing? Yes No
10. Will filing your taxes help you to access new housing? Yes No

The Financial Empowerment and Tax Help Program is supported by funding from:



Canada Revenue
Agency CVITP Grant

Are you at risk of losing your housing and need support?

Homelessness Prevention Resources in Hamilton

Good Shepherd Homelessness Prevention Program

The Homelessness Prevention Program supports families, women, non-binary individuals, and youth at imminent risk (within 60 days) of becoming homeless. To access the program, you must complete a telephone assessment.

Please call for more information or to make a referral.



289-919-0396

Hamilton Regional Indian Centre

Housing and homelessness supports and services for Indigenous individuals and families.



905-548-9593



contact@hric.ca



34 Ottawa Street North

Housing Emergency Fund

The Housing Emergency Fund (HEF) helps Ontario Disability Support Program (ODSP) recipients and Ontario Works (OW) recipients with financial barriers that would prevent them from maintaining their existing housing or securing a new residence, and people with low incomes maintain their existing housing.



hamilton.ca/HousingEmergencyFund

Housing Help Centre Hamilton and Area

Individualized support to maintain or locate housing, help getting access to financial supports, and community referrals.



905-526-8100



info@housinghelpcentre.ca



HousingHelpCentre.ca

St. Matthew's House, Housing Outreach Preventing Eviction for Seniors (HOPES)

Supports for seniors ages 55+ to maintain or find housing, financial supports, and community referrals.

Please call for more information or to make a referral.



905-523-5546 ext.240

Tenant Support Program

Offers free support to low-to moderate-income tenants by partnering with three community agencies – Hamilton ACORN, the Housing Help Centre of Hamilton and Area, and the Hamilton Community Legal Clinic– with a focus on those who have received N12 and N13 notices or an Above-Guideline Increase (AGI).



905-546-2424 ext.1340



TenantSupport@hamilton.ca



hamilton.ca/TenantSupport



Hamilton



Are you at risk of losing your housing and need support?

Homelessness Prevention and Diversion Supports at Emergency Shelters and Drop-ins

Shelter diversion programs are available at the following shelter locations to support households with finding appropriate alternatives to shelter.

Families

Good Shepherd Family Centre

 143 Wentworth Street South
 905-528-9442

Indigenous



Hamilton Regional Indian Centre Drop-in

Diversion support for Indigenous families and youth



 407 King Street West
 905-548-9593  contact@hric.ca

Men and gender diverse individuals



Mission Services Men's Shelter

 400 King Street East  905-528-7635

Salvation Army Booth Centre



 94 York Boulevard  905-527-1444

Good Shepherd Men's Centre



 135 Mary Street  905-528-9109

Women and gender diverse individuals

Good Shepherd Mary's Place and West Avenue Shelter

 20 Pearl Street North  905-540-8000


Mission Services Emma's Place

 196 Wentworth Street North  905-528-5100 ext.1200

Youth

Community Youth Diversion Program

A partnership between Good Shepherd Notre Dame, Wesley, Catholic Children's Aid Society and the Social Planning and Research Council of Hamilton. This program works with youth aged 16-24 to prevent homelessness.

 905-308-8090

For more information or other inquiries, please contact housing@hamilton.ca.