

2023 Volunteer Income Tax Clinics

Central Okanagan

KELOWNA CLINICS

Name & Location	Eligibility	2023 Dates	Details
<p>KCR Community Resources 620 Leon Avenue</p> <p>PHONE: 250.763.8008 ext. 253 EMAIL: csvolunteer@kcr.ca</p>	<p><i>General Public, All persons</i></p>	<p>Virtual Clinic: On-going</p> <p>Drop-off/Pick-up & In-Person: Monday – Friday 8:30 – 4:30</p>	<ul style="list-style-type: none"> • Appointments required for in-person clinic • Virtual clinic available • Tax years 2015 to current year
<p>Ki-Low-Na Friendship Society 442 Leon Avenue</p> <p>PHONE: 250.763.4905 ext. 215 EMAIL: taxdisability@kfs.bc.ca</p>	<p><i>Persons w/ disabilities & Indigenous Peoples prioritized</i></p>	<p>On-going</p> <p>Monday – Friday 9:00 am – 4:00 pm</p>	<ul style="list-style-type: none"> • Email/call and leave a message at reception for information on tax preparation/to book an appointment with Disability Tax Aid advocate
<p>Rutland Activity Centre 765 Dodd Rd</p> <p>PHONE: 250.765-3723</p>	<p><i>Low-income single & couples</i></p>	<p>Every Monday 9:00 am – 12:00 pm March 7 - April 25</p>	<ul style="list-style-type: none"> • Tax clinic offered by walk-in and drop off • 2020-current tax years only
<p>Central Okanagan United Church PHONE: 250.762.3311</p>	<p><i>General public, All persons</i></p>	<p>March 1 - April 27</p>	<ul style="list-style-type: none"> • Call and leave contact information • Church staff will forward contact information to the volunteer to arrange a telephone consultation

<p>Seniors Outreach & Resource Centre #115-2065 Benvoulin Court</p> <p>PHONE: 250.861-6180 WEBSITE: https://seniorsoutreach.ca/volunteer-tax-program/</p>	<p><i>60+ years of age or 55+ with disability</i></p>	<p>Every Wednesday 10:00 am – 2:00 pm</p> <p>March 1 – April 27</p>	<ul style="list-style-type: none"> • No booked appointments • Autofill form online or pick up tax forms from office • Only MUST be under \$35k/yr for singles or \$45/yr for couples • Unless processing taxes via Autofill, must come into office to drop off/pick up your tax forms (couples must come in together)
<p>Okanagan College Accounting Club 1000 K.L.O. Rd First floor of the E Building</p> <p>PHONE: 250.803.1262 or 604.649.1848 EMAIL: cvitp.oc@gmail.com</p>	<p><i>General public/ All persons, Students</i></p>	<p>Monday & Tuesday 11:00 am – 2:00 pm</p> <p>Wednesday & Thursday 3:00 pm - 6:00 pm</p> <p>March 13 – April 14</p>	<ul style="list-style-type: none"> • Walk-in • First come, first serve • Current tax year only • Net income of \$35,000 or less (for individuals) • Government issued photo ID required • The client must provide all tax slips and receipts

WEST KELOWNA CLINIC

<p>Westside Health Network Society</p> <p>PHONE: 250.768.3305 EMAIL: whns@telus.net WEBSITE: www.westsidehealthnetwork.org</p>	<p><i>Low-income individuals</i></p>	<p>Monday - Friday 8:00 am - 2:00 pm</p>	<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

<p>Lake Country Health 10080 Main Street</p> <p>PHONE: 778.215.5247 EMAIL: office@lakecountryhealth.ca</p>	<p><i>Low-income individuals, General Public</i></p>	<p>Monday - Wednesday 9:00 am - 4:30 pm</p> <p>March 14 - April 28</p>	<ul style="list-style-type: none"> • Tax clinic offered by drop off and pick up
<p>PEACHLAND CLINIC</p>			
<p>Peachland Wellness Centre 4426 5th Street</p> <p>PHONE: 250.767.0141 EMAIL: wellnesscentre@shaw.ca</p>	<p><i>General public, All persons</i></p>	<p>Every Tuesday 9:00 am - 3:00 pm</p> <p>March - April</p>	<ul style="list-style-type: none"> • By appointment only • Time slots will be scheduled to drop off tax information and answer basic questions, further conversations will take place over the phone
<p>LOW COST CLINIC</p>			
<p>The Tax Pros Income Tax Service 1953 Harvey Ave</p> <p>PHONE: 250.762.8206 EMAIL: info@thetaxproskelowna.com WEBSITE: www.thetaxprosonline.com</p>	<p><i>Low cost tax service available online or in-person</i></p>	<p>Monday – Friday 9:00 am – 6:00 pm</p> <p>Saturday 9:00 am – 5:00 pm</p>	<ul style="list-style-type: none"> • No appointments during tax season • 20% off for seniors 65+ with complex returns • \$30/tax return for those with less than \$20,000 yearly income (see below for qualifications) <ul style="list-style-type: none"> - Basic returns, PWD, CPP/OAS - No investments income, self-employment or special deductions/credits (besides disability)

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
- interest income over \$1,000
- has foreign property (T1135)
- 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
- 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)
- More than 5 people **up to \$52,500** (add \$2,500 for each additional dependent)

Documents to bring

- Copy of last year's Income Tax Return
- 2022 Tax Assessment
- Tax Forms
- Receipts
- 2022 Tax Slips