

# 2024 Volunteer Income Tax Clinics

## Central Okanagan

Please see income eligibility below on p.4 -5 (from CRA website)



### KELOWNA CLINICS

Name & Location	Eligibility	2024 Dates	Details
<p><b>KCR Community Resources</b> 620 Leon Avenue</p> <p><b>PHONE:</b> <a href="tel:250.763.8008">250.763.8008</a> ext. 253 <b>EMAIL:</b> <a href="mailto:csvolunteer@kcr.ca">csvolunteer@kcr.ca</a></p>	<p><i>General Public, All persons</i></p>	<p><b>Virtual Clinic:</b> On-going</p> <p><b>Drop-off/Pick-up &amp; In-Person:</b> Monday – Friday 8:30 – 4:30 <b>March 4 - May 31</b></p>	<ul style="list-style-type: none"> <li>• <b>Appointments required for in-person clinic and virtual clinic- please contact</b></li> <li>• Current and prior years taxes</li> </ul>
<p><b>Ki-Low-Na Friendship Society</b> 442 Leon Avenue</p> <p><b>PHONE:</b> <a href="tel:250.763.4905">250.763.4905</a> ext. 215 <b>EMAIL:</b> <a href="mailto:taxdisability@kfs.bc.ca">taxdisability@kfs.bc.ca</a></p>	<p><i>Persons w/ disabilities &amp; Indigenous Peoples prioritized</i></p>	<p><b>On-going</b></p> <p><b>Monday – Friday</b> 9:00 am – 4:00 pm</p> <p><b>Starting February 20</b></p>	<ul style="list-style-type: none"> <li>• <b>Appointment required</b></li> <li>• Email/call and leave a message at reception for information on tax preparation/to book an appointment</li> </ul>
<p><b>Rutland Activity/Senior Centre</b> 765 Dodd Rd</p> <p><b>PHONE:</b> <a href="tel:250.765-3723">250.765-3723</a></p>	<p><i>General public, All persons</i></p>	<p><b>Every Monday</b> 9:00 am – 12:00 pm</p> <p><b>March 4 - April 30</b></p>	<ul style="list-style-type: none"> <li>• <b>Tax clinic offered by walk-in and drop off</b></li> <li>• Current and last year taxes only</li> </ul>
<p><b>Central Okanagan United Church</b> 721 Bernard Ave</p> <p><b>PHONE:</b> <a href="tel:250.762.3311">250.762.3311</a></p>	<p><i>General public, All persons</i></p>	<p><b>Thursdays,</b> 9:00am - 12:00pm</p> <p><b>March 7 - April 25</b></p>	<ul style="list-style-type: none"> <li>• <b>Walk-in</b></li> <li>• <b>First come, first served</b></li> <li>• Current and prior years taxes</li> </ul>

<p><b>Seniors Outreach &amp; Resource Centre</b> #115-2065 Benvoulin Court</p> <p><b>PHONE:</b> <a href="tel:250.861-6180">250.861-6180</a> <b>WEBSITE:</b> <a href="https://seniorsoutreach.ca/volunteer-tax-program/">https://seniorsoutreach.ca/volunteer-tax-program/</a></p>	<p><i>60+ years of age or 55+ with disability</i></p>	<p>Every Wednesday 10:00 am – 2:00 pm</p> <p><b>Starting March 6</b></p>	<ul style="list-style-type: none"> <li>• <b>Drop-off and Walk-in, appointment preferred</b></li> <li>• <b>Encouraged to autofill form online or download forms at home for drop-off</b></li> <li>• Only <b>MUST</b> be under \$35k/yr for singles or \$45/yr for couples</li> <li>• Unless processing taxes via Autofill, must come into office to drop off/pick up your tax forms (couples must come in together)</li> </ul>
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## WEST KELOWNA CLINIC

<p><b>Westside Health Network Society</b> 101-3591 Elliot Rd</p> <p><b>PHONE:</b> 250.768.3305 <b>EMAIL:</b> <a href="mailto:whns@telus.net">whns@telus.net</a> <b>WEBSITE:</b> <a href="http://www.westsidehealthnetwork.org">www.westsidehealthnetwork.org</a></p>	<p><i>General public/All persons, Indigenous</i></p>	<p>Ongoing <b>Monday - Friday</b> 8:00 am - 2:00 pm</p>	<ul style="list-style-type: none"> <li>• <b>All tax consultations will be completed via telephone</b></li> <li>• <b>Appointments preferred</b></li> <li>• Information will be forwarded to a tax service volunteer for follow-up</li> <li>• Current and prior tax years</li> </ul>
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## LAKE COUNTRY CLINIC

<p><b>Lake Country Health</b> 10080 Main Street</p> <p><b>PHONE:</b> 778.215.5247 <b>EMAIL:</b> <a href="mailto:office@lakecountryhealth.ca">office@lakecountryhealth.ca</a></p>	<p><i>General public/All persons</i></p>	<p><b>Monday, Tuesday, Wednesday</b> 9:00 am - 1:00 pm</p> <p><b>March 1 - April 30</b></p>	<ul style="list-style-type: none"> <li>• <b>Tax clinic offered by drop off, walk-in, virtual, and by appointment</b></li> </ul>
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## LOW COST CLINIC

<p><b>The Tax Pros Income Tax Service</b> 1953 Harvey Ave</p> <p><b>PHONE:</b> <a href="tel:250.762.8206">250.762.8206</a></p> <p><b>EMAIL:</b> <a href="mailto:info@thetaxproskelowna.com">info@thetaxproskelowna.com</a></p> <p><b>WEBSITE:</b> <a href="http://www.thetaxprosonline.com">www.thetaxprosonline.com</a></p>	<p style="text-align: center;"><i>Low cost tax service available online or in- person</i></p>	<p style="text-align: center;"><b>Monday – Friday</b> 9:00 am – 6:00 pm</p> <p style="text-align: center;"><b>Saturday</b> 9:00 am – 5:00 pm</p>	<ul style="list-style-type: none"> <li>• <b>Taxes prepared by drop-off only</b></li> <li>• 20% off for seniors 65+ with complex returns</li> <li>• \$30/tax return for those with less than \$20,000 yearly income (see below for qualifications)             <ul style="list-style-type: none"> <li>- Basic returns, PWD, CPP/OAS</li> <li>- No investments income, self-employment or special deductions/credits (besides disability)</li> </ul> </li> </ul>
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***See eligibility criteria from the Canada Revenue Agency website on the following pages***

## 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
- Most current Tax Assessment
- Tax Forms
- Receipts
- Most current Tax Slips