

MONEY & BANKING

INCOME TAX FILING ASSISTANCE



INSTRUCTION SHEET

INSTRUCTIONS:

An interview/checklist to see what assistance is available to newcomers for filing federal income tax. This may be done as a contact assignment outside the classroom, or as preparation/preteaching for a guest speaker to the whole class.

During tax season, there are often volunteers available at community centres, immigrant service societies, even shopping malls to help people file their taxes. Check local radio and newspaper listings for information in your community. More information may also be available by going to: <http://www.ccradrc.gc.ca/tax/nonresidents/individuals/newcomer-e.html>

REQUIRED STRUCTURES:

REQUIRED VOCABULARY: *income tax form, federal government, filing taxes, professionals, volunteer assistants, tax season, GST rebate, foreign investments, small business, self-employed, receipts, accounts, tax shelter, flat rate, percentage*

GROUP SIZE: individual

HANDOUTS: Getting Help with your Income Tax questionnaire worksheet

OTHER MATERIALS REQUIRED:

RELATED GRAMMAR:

FOLLOW-UP ACTIVITIES:

Check with local immigrant service agencies to see what services they provide

Discuss if/how students file income tax in their 1st countries

Discuss what taxes pay for

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GETTING HELP WITH YOUR INCOME TAX

Everyone must fill in an income tax form every year and send it to the federal government. This is called *filing your taxes*. Some people file their taxes themselves, but many people need help to fill in all the correct information. There are several professionals, companies and volunteer assistants during “tax season” than can help you understand what to do. They may also be able to help you save money on your taxes and prepare for next year.

LOOK IN THE YELLOW PAGES UNDER “TAX”, AND FIND A LISTING FOR INCOME TAX ASSISTANCE.

Name of the company/individual: _____

Telephone number: _____

TELEPHONE OR VISIT AND FIND OUT THE FOLLOWING INFORMATION:

1. Does anyone in the office speak your first language? **yes** or **no** (circle one)
2. Will they help you with your GST rebate? **yes** or **no** (circle one)
3. Do they have experience with foreign investments? **yes** or **no** (circle one)
4. Do they have experience with small business? **yes** or **no** (circle one)
5. Do they have experience with people who are self-employed? **yes** or **no** (circle one)
6. Can they help you plan for next year? (organise your receipts, open special accounts, create tax shelters?) **yes** or **no** (circle one)
7. If yes, how can they help you? _____

8. How do you pay for this service? flat rate, percentage, or other _____

Check the information above and decide what help is most important for you. Would you take your taxes to this person/company? Why or why not? _____
