

Pathway to Potential
2021 Lunch & Learn Series

Volunteer Income Tax Programs in Windsor-Essex

Tuesday, February 23, 2021
12:00 – 12:30 pm

Presented by: Teresa Falsetta Aflak, Social Policy & Planning Department
Judy Lund & Daniela Pastorius, Family Services Windsor-Essex
Katie Ouellette, South Essex Community Council



Pathway to Potential: Social Investment in Windsor-Essex

- In 2009, Pathway to Potential (P2P) was established by the City of Windsor and County of Essex in response to addressing the needs of children and families living in poverty.
- In 2017, P2P was recalibrated and became a 9-point social investment plan, focused on essential social investments in residents, neighbourhoods and the larger community. As part of this plan, P2P acknowledges the great work being done in our community, by our community partners.
- Today's webinar is meant to shine a spotlight on a few of those community partners doing great work to help those in need.
- In today's webinar, we are talking about the importance of Income Tax preparation and the services that are available to Windsor-Essex residents living with modest incomes.

Zoom Webinar Tips

House Keeping

- We ask that you please mute yourself
 - For those joining by phone - use the mute/unmute button on your phone
 - For those joining by web - Use the buttons on the bottom of your screen
- The host may require to mute you if we experience continued background noise.

Posing Questions & Comments

- Questions can be posed throughout the presentation by using the **Chat Box**. Please direct your messages to **Teresa Aflak**.

Technical issues

- If you experience any issues use the chat to send a private message to **Stephen Lynn**.

Meet Our Presenters

- Daniela Pastorius has been a volunteer with the CVITP program for the past 28 years and has completed thousands of tax returns for low to modest income individuals and their families. She organizes tax clinics for a vast majority of organizations in the city.
- Judy Lund is the Manager of Strategic Development with Family Services Windsor-Essex, including the FSWE Volunteer Income Tax Program. She has over 30 years in community development work throughout Windsor-Essex County.
- Katie Ouellette has worked with the South Essex Community Council for 5 years in various capacities. She has been the program lead for CVITP for 3 years and in that time SECC has filed an average of 500 returns each year for Leamington-Kingsville-Wheatley area residents.





Community Volunteer Income Tax Program (CVITP)



FREE TAX PREPARATION

- Across Canada, *volunteers* complete and file individual tax returns for free, either in person, through drop-off, by videoconference or phone.
- During COVID-19, most are completed by drop-off, videoconference, or phone
- Find volunteers/agencies by checking the [CVITP](#) website
- <https://www.canada.ca/en/revenue-agency/services/tax/individuals/community-volunteer-income-tax-program.html>

Importance of Filing a Tax Return Every Year

- **Federal and Provincial credits, benefits and rebates:**
 - Canada Child Benefit (CCB)
 - GST/HST credit
 - Ontario Trillium Benefit
- **Municipal Financial Relief Programs:**
 - City of Windsor's Property Tax Relief program for Extreme Poverty or Sickness
 - Essex County's property Tax Assistance Program for low-income seniors or persons with disabilities
- **Income Support Eligibility:**
 - Ontario Works (OW)
 - Note: Individuals receiving income support would not be cut off if tax returns were not filed
 - Ontario Disability Support Program (ODSP)
- **Income Based Services or Discounts:**
 - Qualify for discounts through the Pathway to Potential programs in Windsor-Essex:
 - 90% recreation program discounts
 - 49% discount on monthly bus pass through the Affordable Pass Program
 - Qualify for a lawyer through Legal Aid
 - Ontario's Healthy Smiles program

CVITP Income Tax Completion Service

- Canada Revenue Agency Trained and Approved Volunteers
- Canada Revenue Agency Income Tax Return Software
- Computerized Electronic Returns
 - Returns are prepared and electronically filed.
 - Notice of Assessment is sent by CRA directly to the applicant
- Canadian Tax Season opens Monday Feb 22, 2021
- Filing deadline is April 30, 2021

Eligibility

Modest income

Family size	Total family income
1 person	\$35,000
2 persons	\$45,000
3 persons	\$47,500
4 persons	\$50,000
5 persons	\$52,500
more than 5 persons	\$52,500 plus \$2,500 for each additional person

*Please note that the eligibility requirements are CRA guidelines

Eligibility

Simple tax situation

- Either no income or income comes from these sources:
 - Employment, including CERB and COVID19 assistance
 - Pension
 - Benefits such as Canada Pension Plan, disability, employment insurance, social assistance
 - Registered retirement savings plans (RRSP's)
 - Support payments
 - Scholarships, fellowships, bursaries or grants
 - Interest (under \$1,000)

*Please note that the eligibility requirements are CRA guidelines

Eligibility

Tax situations that are NOT simple (not eligible):

- Self-employed or have employment expenses
- Have business or rental income and expenses
- Have capital gains or losses
- Filed for bankruptcy
- Completing a tax return for a deceased person

*Please note that the eligibility requirements are CRA guidelines

- FSWE goal is to ensure people's basic needs have been met including income and income supports (need to file returns)
- We have dedicated volunteers that complete the returns for people in Windsor & Essex County.
- During COVID19, FSWE handling by drop-off and phone.
- Our service is open year-round and will do past years (after tax season).
- FSWE guidelines and forms: www.fswe.ca [Income Taxes](#)



Beginning March 1st 2021 SECC will be offering FREE Virtual Income Tax Clinics

AVAILABLE METHODS FOR FILING:

- Document drop off
- E-mail Correspondence
- Phone Appointment
- In Person Appointment*

CONTACT:

Katie Ouellette

Program Leader

215 Talbot St. E Leamington

E: kouellette@secc.on.ca

Ph: 519-326-8629 x381

This service is provided by SECC year round.

Previous tax years may also be filed.

More information and full details on each filing method are available at www.secc.on.ca/taxes

Where to Find More Information & Organizations

- Search for a free tax clinic on the [Community Volunteer Income Tax Program](#) website
- Call 211 or visit their website at <https://211southwest.ca/>
- Other organizations that offer tax clinics:
 - **Amherstburg Community Services** – [Income Tax Clinics](#)
 - Phone number: **519-736-5471**
 - **Community Support Centre of Essex County** – [Income Tax Drop off Location](#)
 - Phone number: **519-728-1435**
 - [Downtown Mission of Windsor Inc.](#) – **Year Round Income Tax Clinic**
 - Please note: the Downtown Mission will **only be accepting phone calls at this time**. Clients wishing to have their taxes completed by a volunteer over the phone can call **519-973-5573**.
 - [Life After Fifty](#) – offering virtual income tax clinic appointments for eligible seniors (50 years or older)
 - Contact by phone for an appointment at **519-254-1108 ext. 113**

Thank you!

Have any questions?



Visit the Family Services Windsor-Essex [Tax Completion Service Website](#)

Contact FSWE by Phone at **1-888-933-1831** or **519-966-5010**

Contact FSWE by Email at info@fswe.ca



Visit the South Essex Community Council [Free Virtual Income Tax Clinic Website](#)

Contact Katie by phone at **519-326-8629 ext. 381**

Contact Katie by Email at kouellette@secc.on.ca

Contact the Canada Revenue Agency (CRA) by phone at **1-800-959-8281**



PATHWAY TO
POTENTIAL

Social Investment Windsor-Essex

**For a copy of the slide deck or more information
about Pathway to Potential:**

Contact us at p2p@citywindsor.ca

OR

Visit our website at www.pathwaytopotential.ca

To stay up to date on news from Pathway to Potential, you can also [sign up to receive
our monthly Newsletter](#)