

Phone \_\_\_\_\_ Tax Return Summary Tax Year \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_

**Identification & Status**

Social Ins No: \_\_\_\_\_  
Date of birth: \_\_\_\_\_  
Prov. Residence: \_\_\_\_\_  
Marital Status: \_\_\_\_\_

**Refund**

**Balance owing**

**Spouse Info**

Social Ins No: \_\_\_\_\_  
Date of birth: \_\_\_\_\_  
Net income \_\_\_\_\_  
Taxable income: \_\_\_\_\_

**Total Income**

|                       |            |  |
|-----------------------|------------|--|
| Employment income     | 101        |  |
| Other empl. Inc.      | 104        |  |
| Old age sec. pension  | 113        |  |
| CPP                   | 114        |  |
| Other pensions        | 115        |  |
| Split-pension amount  | 116        |  |
| UUCB                  | 117        |  |
| EI benefit            | 119        |  |
| Taxable dividends     | 120        |  |
| Interest/Investment   | 121        |  |
| Net partnership       | 122        |  |
| RDSP income           | 125        |  |
| Net rental income     | 126        |  |
| Gross rental income   | 160        |  |
| Taxable capital gain  | 127        |  |
| Taxable support       | 128        |  |
| RRSP income           | 129        |  |
| Other income          | 130        |  |
| Net Bus. Income       | 135        |  |
| Gross Bus. inc.       | 162        |  |
| Net Prof. income      | 137        |  |
| Gross Prof. income    | 164        |  |
| Net Comm. Income      | 139        |  |
| Gross Comm. Income    | 166        |  |
| Net Farm. Income      | 141        |  |
| Gross Farm. Income    | 168        |  |
| Net Fishing income    | 143        |  |
| Gross Fishing income  | 170        |  |
| Workers' compensation | 144        |  |
| Social assistance     | 145        |  |
| Net federal suppl.    | 146        |  |
| <b>Total Income</b>   | <b>150</b> |  |

**Net Income**

|                         |     |  |
|-------------------------|-----|--|
| RPP                     | 207 |  |
| RRSP                    | 208 |  |
| Deduction Split-pension | 210 |  |
| Union/prof. dues        | 212 |  |
| UCCB repayment          | 213 |  |
| Child care exp.         | 214 |  |
| Disability supports     | 215 |  |
| ABIL deduction          | 217 |  |
| Moving exp.             | 219 |  |
| Allowable support pmnt. | 220 |  |
| Carrying charges        | 221 |  |
| Deduction for CPP       | 222 |  |

|                       |            |  |
|-----------------------|------------|--|
| Expl./Dev. Exp.       | 224        |  |
| Other empl. Exp.      | 229        |  |
| Clergy residence      | 231        |  |
| Other deduction       | 232        |  |
| Soc. Benefits repmnt. | 235        |  |
| <b>Net Income</b>     | <b>236</b> |  |

**Taxable Income**

|                         |            |  |
|-------------------------|------------|--|
| Canadian Forces/police  | 244        |  |
| Employee home reloc.    | 248        |  |
| Security options        | 249        |  |
| Other pmnts deduction   | 250        |  |
| Ltd. Partnership losses | 251        |  |
| Non-capital losses      | 252        |  |
| Net capital losses      | 253        |  |
| Capital gains ded.      | 254        |  |
| Northern residents ded. | 255        |  |
| Additional ded.         | 256        |  |
| <b>Taxable Income</b>   | <b>260</b> |  |

**Federal tax**

|                            |            |  |
|----------------------------|------------|--|
| Fed. tax on split-inc.     | 424        |  |
| Fed. dividend tax cre.     | 425        |  |
| Min. tax carryover         | 427        |  |
| Basic federal tax          | 429        |  |
| Foreign tax credit         | 405        |  |
| Federal tax                | 406        |  |
| Tot. fed. political contr. | 409        |  |
| Fed. Poli. Contr. Cre.     | 410        |  |
| Investment tax credit      | 412        |  |
| Special taxes              | 418        |  |
| <b>Net federal tax</b>     | <b>420</b> |  |

**Provincial Taxes**

|                         |            |  |
|-------------------------|------------|--|
| CPP payable             | 421        |  |
| EI payable              | 430        |  |
| Social benefits repmnt. | 422        |  |
| Provincial tax          | 428        |  |
| Yukon First Nations tax | 432        |  |
| <b>Total payable</b>    | <b>435</b> |  |

**Federal non-refundable credits**

|                             |            |  |
|-----------------------------|------------|--|
| Basic personal amount       | 300        |  |
| Age amount                  | 301        |  |
| Spouse amount               | 303        |  |
| Amt. for eligible dep.      | 305        |  |
| Family care amt.            | 367        |  |
| Amt. infirm dep. 18+        | 307        |  |
| CPP thru. Empl.             | 308        |  |
| CPP on self-empl.           | 310        |  |
| EI thru. Empl.              | 312        |  |
| EI on self-empl.            | 317        |  |
| Canada employment           | 363        |  |
| Public transit amt.         | 364        |  |
| Children's arts amt.        | 370        |  |
| Home accessibility          | 398        |  |
| Home buyer's amt.           | 369        |  |
| Adoption exp.               | 313        |  |
| Pension income amt.         | 314        |  |
| Disability amt.             | 316        |  |
| Disa. amt. transferred      | 318        |  |
| Interest on stu. Loans      | 319        |  |
| Tuition/Edu./Textbooks      | 323        |  |
| Tuition transferred         | 324        |  |
| Trans. from spouse          | 326        |  |
| Medical expenses            | 332        |  |
| Donations                   | 349        |  |
| <b>Tot. Non-ref credits</b> | <b>350</b> |  |

**Refundable Credits**

|                          |            |  |
|--------------------------|------------|--|
| Tot.income tax ded.      | 437        |  |
| Ref. QC abatement        | 440        |  |
| CPP overpayment          | 448        |  |
| Climate action Incentive | 449        |  |
| EI overpayment           | 450        |  |
| Ref. med. exp. suppl.    | 452        |  |
| WITB                     | 453        |  |
| Ref. invest. tax credit  | 454        |  |
| XII.2 trust tax credit   | 456        |  |
| GST/HST rebate           | 457        |  |
| Supply tax credit        | 469        |  |
| Tax paid by instalments  | 476        |  |
| Prov. (Terr.) tax credit | 479        |  |
| <b>Tot. ref. credits</b> | <b>482</b> |  |

**Benefit Summary and Carry-forward Items**

|                                  |  |                      |  |                          |  |
|----------------------------------|--|----------------------|--|--------------------------|--|
| GST Rebate (estimate)            |  | Unused RRSP          |  | Unused Moving Exp.       |  |
| CCTB Benefit (estimate)          |  | Unused Fed. Tuition  |  | Ontario Trillium Benefit |  |
| New RRSP Room earned             |  | Unused Prov. Tuition |  |                          |  |
| Ontario Child benefit (estimate) |  | Capital Loss         |  |                          |  |

Prepared by: \_\_\_\_\_ Phone: \_\_\_\_\_ Date: \_\_\_\_\_