

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: \_\_\_\_\_