

# Tax Return Summary

Tax Year \_\_\_\_\_

Taxpayer Name \_\_\_\_\_ Phone \_\_\_\_\_ Address \_\_\_\_\_

### Identification & Status

**Refund 484**

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

**Balance owing 485**

### 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> | _____ |

|                       |            |       |
|-----------------------|------------|-------|
| 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. for infirm dep.        | 306        | _____ |
| 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        | _____ |
| Caregiver amt.              | 315        | _____ |
| 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        | _____ |
| 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        | _____ |
| Children's fitness credit | 459        | _____ |
| Supply tax credit         | 469        | _____ |
| Tax paid by instalments   | 479        | _____ |
| <b>Tot. ref. credits</b>  | <b>482</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 | _____ |

### 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: \_\_\_\_\_