

Client description

Corporate Tax Scenario
By Tax Templates Inc. Demo

Enter a client description to begin,
or click here for an overview video.

- T2
- ∞ - Taxpayer details
- ∞ - Taxable income
- ∞ - Active business income
- ∞ - Foreign amounts
- ∞ - Corporate taxes/cash
- ∞ - Contributions and carryforwards

∞ - Client description

Enter a client description. We also suggest saving the file at its intended location now.

	Taxpayer details		Taxpayer details	
	Corporation 1		Corporation 2	
	Scenario 1		Scenario 2	
Name				
Description				
Province				
Year end				
Year start				
Type	CCPC		CCPC	
	Taxable income		Taxable income	
Active business income	-		-	
Related addbacks (deductions)	-		-	
Related addbacks (deductions)	-		-	
Other investment income - Canadian only	-		-	
Related addbacks (deductions)	-		-	
Net capital gains (losses)	-		-	
(Non-taxable portion)	-		-	
Eligible dividends - not connected	-		-	
Capital dividends received	-		-	
(Non-taxable portion)	-		-	
Total net foreign non-business income	-		-	
(Subsection 20(12) deduction)	-		-	
Net income (loss) for tax purposes	-		-	
(Taxable dividends deductible)	-		-	
(Net capital losses of previous tax years)	-		-	
(Non-capital losses of previous tax year)	-		-	
Taxable income	-		-	
	Active business income		Active business income	
Income subject to Federal SBD	-		-	
Income subject to provincial or territorial SBD	-		-	
Adjusted Aggregate Investment Income	-		-	

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	Foreign amounts		Foreign amounts	
Country	-		-	
Net foreign capital gains	-		-	
Net foreign non-business income	-		-	
Net foreign non-business income - for Sch 21	-		-	
Foreign taxes on non-business income	-		-	
Federal non-business FTC claimed	-		-	
Provincial non-business FTC claimed	-		-	
20(12) deduction claimed on non-business	-		-	

	Corporate cash summary		Corporate cash summary	
Total cash	-		-	
Adjustment	-		-	
Net cash before corporate taxes	-		-	
(Part I tax - non-refundable)	-		-	
(Part I tax - refundable)	-		-	
(Part III tax)	-		-	
(Part III.1 tax)	-		-	
(Part IV tax - ERDTH)	-		-	
(Part IV tax - NERDTH)	-		-	
(Net provincial tax)	-		-	
Dividend refund - ERDTH	-		-	
Dividend refund - NERDTH	-		-	
Adjustment	-		-	
Net cash after corporate taxes	-		-	
(Tax-free amounts paid)	-		-	
(Capital gains distributions)	-		-	
(Dividends paid - capital)	-		-	
(Dividends paid - eligible)	-		-	
(Dividends paid - other than eligible)	-		-	
Net cash after distributions	-		-	

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	Carryforwards summary		Carryforwards summary	
	Net capital losses		Net capital losses	
Net capital losses	-		-	
Increase	-		-	
(Claimed)	-		-	
Closing	-		-	
	Non-capital losses		Non-capital losses	
Non-capital losses	-		-	
Increase	-		-	
(Claimed)	-		-	
Closing	-		-	
	Non-eligible refundable dividend tax on hand		Non-eligible refundable dividend tax on hand	
NERDTH	-		-	
NERDTH - Part I tax - refundable	-		-	
NERDTH - Part IV tax - not connected	-		-	
NERDTH - Part IV tax - connected	-		-	
(NERDTH - Dividend refund)	-		-	
Closing	-		-	
	Eligible refundable dividend tax on hand		Eligible refundable dividend tax on hand	
ERDTH	-		-	
ERDTH - Part I tax - refundable	-		-	
ERDTH - Part IV tax - not connected	-		-	
ERDTH - Part IV tax - connected	-		-	
(ERDTH - Dividend refund)	-		-	
Closing	-		-	
	General rate income pool		General rate income pool	
GRIP	-		-	
Income taxable at the general rate * 0.72	-		-	
Eligible dividends received	-		-	
(Eligible dividends paid)	-		-	
Closing	-		-	
	Capital dividend account		Capital dividend account	
Opening CDA - net capital gains (losses)	-		-	
Opening CDA - capital dividends received	-		-	
Opening CDA - other	-		-	
Opening CDA - (capital dividends paid)	-		-	
CDA - Net capital gains (losses)	-		-	
CDA - Capital dividends received	-		-	
CDA - Other	-		-	
CDA - (Capital dividends paid)	-		-	
Closing	-		-	

Client description	Prepared	Name	Date
Corporate Tax Scenario	Reviewed		
By Tax Templates Inc. Demo	Approved		

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	Taxpayer details		Taxpayer details	
Name	Corporation 3		Corporation 4	
Description	Scenario 3		Scenario 4	
Province				
Year end				
Year start				
Type	CCPC		CCPC	
	Taxable income		Taxable income	
Active business income	-		-	
Related addbacks (deductions)	-		-	
Related addbacks (deductions)	-		-	
Other investment income - Canadian only	-		-	
Related addbacks (deductions)	-		-	
Net capital gains (losses)	-		-	
(Non-taxable portion)	-		-	
Eligible dividends - not connected	-		-	
Capital dividends received	-		-	
(Non-taxable portion)	-		-	
Total net foreign non-business income	-		-	
(Subsection 20(12) deduction)	-		-	
Net income (loss) for tax purposes	-		-	
(Taxable dividends deductible)	-		-	
(Net capital losses of previous tax years)	-		-	
(Non-capital losses of previous tax year)	-		-	
Taxable income	-		-	
	Active business income		Active business income	
Income subject to Federal SBD	-		-	
Income subject to provincial or territorial SBD	-		-	
Adjusted Aggregate Investment Income	-		-	

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Corporate Tax Scenario	Reviewed		
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	Carryforwards summary		Carryforwards summary	
	Net capital losses		Net capital losses	
Net capital losses	-		-	
Increase	-		-	
(Claimed)	-		-	
Closing	-		-	
	Non-capital losses		Non-capital losses	
Non-capital losses	-		-	
Increase	-		-	
(Claimed)	-		-	
Closing	-		-	
	Non-eligible refundable dividend tax on hand		Non-eligible refundable dividend tax on hand	
NERDTOH	-		-	
NERDTOH - Part I tax - refundable	-		-	
NERDTOH - Part IV tax - not connected	-		-	
NERDTOH - Part IV tax - connected	-		-	
(NERDTOH - Dividend refund)	-		-	
Closing	-		-	
	Eligible refundable dividend tax on hand		Eligible refundable dividend tax on hand	
ERDTOH	-		-	
ERDTOH - Part I tax - refundable	-		-	
ERDTOH - Part IV tax - not connected	-		-	
ERDTOH - Part IV tax - connected	-		-	
(ERDTOH - Dividend refund)	-		-	
Closing	-		-	
	General rate income pool		General rate income pool	
GRIP	-		-	
Income taxable at the general rate * 0.72	-		-	
Eligible dividends received	-		-	
(Eligible dividends paid)	-		-	
Closing	-		-	
	Capital dividend account		Capital dividend account	
Opening CDA - net capital gains (losses)	-		-	
Opening CDA - capital dividends received	-		-	
Opening CDA - other	-		-	
Opening CDA - (capital dividends paid)	-		-	
CDA - Net capital gains (losses)	-		-	
CDA - Capital dividends received	-		-	
CDA - Other	-		-	
CDA - (Capital dividends paid)	-		-	
Closing	-		-	

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	Taxpayer details		Taxpayer details	
Name	Corporation 5		Corporation 6	
Description	Scenario 5		Scenario 6	
Province				
Year end				
Year start				
Type	CCPC		CCPC	
	Taxable income		Taxable income	
Active business income	-		-	
Related addbacks (deductions)	-		-	
Related addbacks (deductions)	-		-	
Other investment income - Canadian only	-		-	
Related addbacks (deductions)	-		-	
Net capital gains (losses)	-		-	
(Non-taxable portion)	-		-	
Eligible dividends - not connected	-		-	
Capital dividends received	-		-	
(Non-taxable portion)	-		-	
Total net foreign non-business income	-		-	
(Subsection 20(12) deduction)	-		-	
Net income (loss) for tax purposes	-		-	
(Taxable dividends deductible)	-		-	
(Net capital losses of previous tax years)	-		-	
(Non-capital losses of previous tax year)	-		-	
Taxable income	-		-	
	Active business income		Active business income	
Income subject to Federal SBD	-		-	
Income subject to provincial or territorial SBD	-		-	
Adjusted Aggregate Investment Income	-		-	

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- ∞ - Foreign amounts
- ∞ - Corporate taxes/cash
- ∞ - Contributions and carryforwards

	Carryforwards summary		Carryforwards summary	
	Net capital losses		Net capital losses	
Net capital losses	-		-	
Increase	-		-	
(Claimed)	-		-	
Closing	-		-	
	Non-capital losses		Non-capital losses	
Non-capital losses	-		-	
Increase	-		-	
(Claimed)	-		-	
Closing	-		-	
	Non-eligible refundable dividend tax on hand		Non-eligible refundable dividend tax on hand	
NERDTOH	-		-	
NERDTOH - Part I tax - refundable	-		-	
NERDTOH - Part IV tax - not connected	-		-	
NERDTOH - Part IV tax - connected	-		-	
(NERDTOH - Dividend refund)	-		-	
Closing	-		-	
	Eligible refundable dividend tax on hand		Eligible refundable dividend tax on hand	
ERDTOH	-		-	
ERDTOH - Part I tax - refundable	-		-	
ERDTOH - Part IV tax - not connected	-		-	
ERDTOH - Part IV tax - connected	-		-	
(ERDTOH - Dividend refund)	-		-	
Closing	-		-	
	General rate income pool		General rate income pool	
GRIP	-		-	
Income taxable at the general rate * 0.72	-		-	
Eligible dividends received	-		-	
(Eligible dividends paid)	-		-	
Closing	-		-	
	Capital dividend account		Capital dividend account	
Opening CDA - net capital gains (losses)	-		-	
Opening CDA - capital dividends received	-		-	
Opening CDA - other	-		-	
Opening CDA - (capital dividends paid)	-		-	
CDA - Net capital gains (losses)	-		-	
CDA - Capital dividends received	-		-	
CDA - Other	-		-	
CDA - (Capital dividends paid)	-		-	
Closing	-		-	

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	Taxpayer details		Taxpayer details	
Name	Corporation 7		Corporation 8	
Description	Scenario 7		Scenario 8	
Province				
Year end				
Year start				
Type	CCPC		CCPC	
	Taxable income		Taxable income	
Active business income	-		-	
Related addbacks (deductions)	-		-	
Related addbacks (deductions)	-		-	
Other investment income - Canadian only	-		-	
Related addbacks (deductions)	-		-	
Net capital gains (losses)	-		-	
(Non-taxable portion)	-		-	
Eligible dividends - not connected	-		-	
Capital dividends received	-		-	
(Non-taxable portion)	-		-	
Total net foreign non-business income	-		-	
(Subsection 20(12) deduction)	-		-	
Net income (loss) for tax purposes	-		-	
(Taxable dividends deductible)	-		-	
(Net capital losses of previous tax years)	-		-	
(Non-capital losses of previous tax year)	-		-	
Taxable income	-		-	
	Active business income		Active business income	
Income subject to Federal SBD	-		-	
Income subject to provincial or territorial SBD	-		-	
Adjusted Aggregate Investment Income	-		-	

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 Corporate Tax Scenario
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[∞ - Client description](#)

	Foreign amounts		Foreign amounts	
Country		-		-
Net foreign capital gains	-		-	
Net foreign non-business income	-		-	
Net foreign non-business income - for Sch 21	-		-	
Foreign taxes on non-business income	-		-	
Federal non-business FTC claimed	-		-	
Provincial non-business FTC claimed	-		-	
20(12) deduction claimed on non-business	-		-	
	Corporate cash summary		Corporate cash summary	
Total cash	-		-	
Adjustment	-		-	
Net cash before corporate taxes	-		-	
(Part I tax - non-refundable)	-		-	
(Part I tax - refundable)	-		-	
(Part III tax)	-		-	
(Part III.1 tax)	-		-	
(Part IV tax - ERDTH)	-		-	
(Part IV tax - NERDTH)	-		-	
(Net provincial tax)	-		-	
Dividend refund - ERDTH	-		-	
Dividend refund - NERDTH	-		-	
Adjustment	-		-	
Net cash after corporate taxes	-		-	
(Tax-free amounts paid)	-		-	
(Capital gains distributions)	-		-	
(Dividends paid - capital)	-		-	
(Dividends paid - eligible)	-		-	
(Dividends paid - other than eligible)	-		-	
Net cash after distributions	-		-	

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	Carryforwards summary		Carryforwards summary	
	Net capital losses		Net capital losses	
Net capital losses	-		-	
Increase	-		-	
(Claimed)	-		-	
Closing	-		-	
	Non-capital losses		Non-capital losses	
Non-capital losses	-		-	
Increase	-		-	
(Claimed)	-		-	
Closing	-		-	
	Non-eligible refundable dividend tax on hand		Non-eligible refundable dividend tax on hand	
NERDTOH	-		-	
NERDTOH - Part I tax - refundable	-		-	
NERDTOH - Part IV tax - not connected	-		-	
NERDTOH - Part IV tax - connected	-		-	
(NERDTOH - Dividend refund)	-		-	
Closing	-		-	
	Eligible refundable dividend tax on hand		Eligible refundable dividend tax on hand	
ERDTOH	-		-	
ERDTOH - Part I tax - refundable	-		-	
ERDTOH - Part IV tax - not connected	-		-	
ERDTOH - Part IV tax - connected	-		-	
(ERDTOH - Dividend refund)	-		-	
Closing	-		-	
	General rate income pool		General rate income pool	
GRIP	-		-	
Income taxable at the general rate * 0.72	-		-	
Eligible dividends received	-		-	
(Eligible dividends paid)	-		-	
Closing	-		-	
	Capital dividend account		Capital dividend account	
Opening CDA - net capital gains (losses)	-		-	
Opening CDA - capital dividends received	-		-	
Opening CDA - other	-		-	
Opening CDA - (capital dividends paid)	-		-	
CDA - Net capital gains (losses)	-		-	
CDA - Capital dividends received	-		-	
CDA - Other	-		-	
CDA - (Capital dividends paid)	-		-	
Closing	-		-	



	Corporation 1 Scenario 1	Corporation 2 Scenario 2	Corporation 3 Scenario 3	Corporation 4 Scenario 4	Corporation 5 Scenario 5	Corporation 6 Scenario 6	Corporation 7 Scenario 7	Corporation 8 Scenario 8
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■ Part I tax - non-refundable	-	-	-	-	-	-	-	-
■ Part I tax - refundable	-	-	-	-	-	-	-	-
■ Part III.1 tax	-	-	-	-	-	-	-	-
■ Part III tax	-	-	-	-	-	-	-	-
■ Part IV tax	-	-	-	-	-	-	-	-
■ Net provincial taxes	-	-	-	-	-	-	-	-
■ (Dividend refund)	-	-	-	-	-	-	-	-
■ Adjustment	-	-	-	-	-	-	-	-
■ Dividends and other distributions paid	-	-	-	-	-	-	-	-
■ Cash retained, after taxes	-	-	-	-	-	-	-	-



	Corporation 1 Scenario 1	Corporation 2 Scenario 2	Corporation 3 Scenario 3	Corporation 4 Scenario 4	Corporation 5 Scenario 5	Corporation 6 Scenario 6	Corporation 7 Scenario 7	Corporation 8 Scenario 8
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■ Active business income	-	-	-	-	-	-	-	-
■ Other investment income - Canadian only	-	-	-	-	-	-	-	-
■ Net capital gains (losses)	-	-	-	-	-	-	-	-
■ Dividend income	-	-	-	-	-	-	-	-
■ Foreign income	-	-	-	-	-	-	-	-
■ (Deductions and adjustments)	-	-	-	-	-	-	-	-
■ (Total corporate taxes)	-	-	-	-	-	-	-	-