

Client description

Corporate and Personal Tax Scenario
By Tax Templates Inc. Demo

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

- ∞ - Worksheet
- ∞ - T2
- ∞ - T1 Base
- ∞ - Base Results
- ∞ - T1 Marginal
- ∞ - Marginal Results
- ∞ - Total Results
- 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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	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	-		-	

Client description
 Corporate and Personal Tax Scenario
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Prepared	Name	Date
Reviewed		
Approved		

Enter a client description to begin,
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∞ - Client description

	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	-		-	

Client description Corporate and Personal Tax Scenario By Tax Templates Inc. Demo	Prepared	Name	Date
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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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- ∞ - Corporate taxes/cash
- ∞ - Contributions and carryforwards

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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

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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	
	Corporation 7		Corporation 8	
	Scenario 7		Scenario 8	
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	
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	Taxpayer 1		Taxpayer 2	
Description	Scenario 1		Scenario 2	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
Date of death				
	Taxable income		Taxable income	
Employment	-		-	
Old Age Security	-		-	
CPP or QPP benefits	-		-	
Eligible pension	-		-	
Pension split	-	∞	-	∞
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Interest and other investment	-		-	
Capital gains - proceeds	-		-	
(Capital gains - adjusted cost base)	-		-	
(Non-taxable portion)	-		-	
Other income	-		-	
Canada emergency response benefit	-		-	
Canada emergency student benefit	-		-	
Canada recovery benefit	-		-	
Canada recovery caregiving benefit	-		-	
Canada recovery sickness benefit	-		-	
Net business income (loss)	-		-	
Workers' compensation benefits	-		-	
Social assistance payments	-	∞	-	∞
Net federal supplements	-		-	
Total income (loss)	-		-	
(Registered pension plan deduction)	-		-	
(RRSP deduction)	-	∞	-	∞
(Pension split)	-	∞	-	∞
(Childcare expenses)	-		-	
(Carrying charges and interest expenses)	-		-	
(CPP/QPP - enhancement)	-		-	
(CPP/QPP on business)	-		-	
(Other employment expenses)	-		-	
Net income before social benefits repayment	-		-	
(Social benefits repayment)	-		-	
Net income (loss)	-		-	
(Other payments deduction)	-		-	
(Net capital losses of other years)	-	∞	-	∞
Taxable income (loss)	-		-	
	Tax On Split Income		Tax On Split Income	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Net capital gains	-		-	
(Non-taxable portion)	-		-	
Split income	-		-	
	Employment income details		Employment income details	
Employment income subject to CPP/QPP	-		-	
Other employment income elect into CPP/QPP	-		-	
Employment income subject to EI	-		-	
Self-employment income subject to EI	-		-	
	Tax credits and other amounts		Tax credits and other amounts	
Attendant care expenses	-		-	
Disability amount eligible	FALSE		FALSE	
Medical expenses	-		-	
Medical expenses that eliminate disability	-		-	
Social assistance payments	-	∞	-	∞
Total income tax deducted	-		-	
Tax paid by instalments	-		-	

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	Dependants			Dependants		
	Dependant 01			Dependant 01		
	Dependant 01			Dependant 01		
Name	Single			Single		
Marital status	Single			Single		
Province						
Date of birth						
Relationship	Child			Child		
Lived with taxpayer	TRUE			TRUE		
Shared custody	FALSE			FALSE		
Child support made during year	FALSE			FALSE		
Disability amount eligible	FALSE			FALSE		
Childcare expenses	-			-		
Net income	-			-		
Taxable income	-			-		
	Contributions and carryforwards			Contributions and carryforwards		
	Net capital losses			Net capital losses		
Net capital losses	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	Alternative minimum tax			Alternative minimum tax		
Alternative minimum tax	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	RRSP contributions			RRSP contributions		
Undeducted RRSPs - Jan to Feb	-			-		
Undeducted RRSPs - other periods	-			-		
RRSP contributions - Mar to Dec	-			-		
RRSP contributions - Jan to Feb	-			-		
Transfers to RRSP, PRPP, and SPP	-			-		
(Repayment of HBP)	-			-		
(Deducted)	- ∞			- ∞		
Closing	-			-		
	RRSP deduction limit			RRSP deduction limit		
RRSP deduction limit	-			-		
PRPP employer contributions	-			-		
(RRSP, PRPP, and SPP contributions deducted)	-			-		
RRSP deduction limit available	-			-		
Increase to RRSP limit from earned income	-			-		
(Unused RRSP contribution available to deduct)	-			-		
Available contribution room	-			-		
	Donations			Donations		
Donations	-			-		
Donations made in tax year	-			-		
Certified cultural property donated in tax year	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	Discretionary amounts			Discretionary amounts		
	Input	Baseline	Maximum	Input	Baseline	Maximum
RRSP deduction	- ∞	-	-	- ∞	-	-
Net capital losses	- ∞	-	-	- ∞	-	-
AMT carry-forwards	- ∞	-	-	- ∞	-	-
Donations	- ∞	-	-	- ∞	-	-
Pension income splitting transferor	- ∞	-	-	- ∞	-	-
Total medical expenses to optimize	-	-	-	-	-	-
Attendant care - for first or single	-	-	-	-	-	-
Medical	-	-	-	-	-	-
Medical that eliminates disability - for first or single	-	-	-	-	-	-
Eligible dependant to claim	None	None	None	None	None	None

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Prepared	Name	Date
Reviewed		
Approved		

Indexation rates	
2022	-
2023	-
2024	-
2025+	-

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	Taxpayer details		Taxpayer details	
Name	Taxpayer 3		Taxpayer 4	
Description	Scenario 3		Scenario 4	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
Date of death				

	Taxable income		Taxable income	
Employment	-		-	
Old Age Security	-		-	
CPP or QPP benefits	-		-	
Eligible pension	-		-	
Pension split	- ∞		- ∞	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Interest and other investment	-		-	
Capital gains - proceeds	-		-	
(Capital gains - adjusted cost base)	-		-	
(Non-taxable portion)	-		-	
Other income	-		-	
Canada emergency response benefit	-		-	
Canada emergency student benefit	-		-	
Canada recovery benefit	-		-	
Canada recovery caregiving benefit	-		-	
Canada recovery sickness benefit	-		-	
Net business income (loss)	-		-	
Workers' compensation benefits	-		-	
Social assistance payments	- ∞		- ∞	
Net federal supplements	-		-	
Total income (loss)	-		-	
(Registered pension plan deduction)	-		-	
(RRSP deduction)	- ∞		- ∞	
(Pension split)	- ∞		- ∞	
(Childcare expenses)	-		-	
(Carrying charges and interest expenses)	-		-	
(CPP/QPP - enhancement)	-		-	
(CPP/QPP on business)	-		-	
(Other employment expenses)	-		-	
Net income before social benefits repayment	-		-	
(Social benefits repayment)	-		-	
Net income (loss)	-		-	
(Other payments deduction)	-		-	
(Net capital losses of other years)	- ∞		- ∞	
Taxable income (loss)	-		-	

	Tax On Split Income		Tax On Split Income	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Net capital gains	-		-	
(Non-taxable portion)	-		-	
Split income	-		-	

	Employment income details		Employment income details	
Employment income subject to CPP/QPP	-		-	
Other employment income elect into CPP/QPP	-		-	
Employment income subject to EI	-		-	
Self-employment income subject to EI	-		-	

	Tax credits and other amounts		Tax credits and other amounts	
Attendant care expenses	-		-	
Disability amount eligible	FALSE		FALSE	
Medical expenses	-		-	
Medical expenses that eliminate disability	-		-	
Social assistance payments	- ∞		- ∞	
Total income tax deducted	-		-	
Tax paid by instalments	-		-	

Client description
 Corporate and Personal Tax Scenario
 By Tax Templates Inc. Demo

Prepared	Name	Date
Reviewed		
Approved		

Indexation rates	
2022	-
2023	-
2024	-
2025+	-

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

∞ - Client description

	Dependants			Dependants		
	Dependant 01			Dependant 01		
	Dependant 01			Dependant 01		
Name	Single			Single		
Marital status	Single			Single		
Province						
Date of birth						
Relationship	Child			Child		
Lived with taxpayer	TRUE			TRUE		
Shared custody	FALSE			FALSE		
Child support made during year	FALSE			FALSE		
Disability amount eligible	FALSE			FALSE		
Childcare expenses	-			-		
Net income	-			-		
Taxable income	-			-		
	Contributions and carryforwards			Contributions and carryforwards		
	Net capital losses			Net capital losses		
Net capital losses	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	Alternative minimum tax			Alternative minimum tax		
Alternative minimum tax	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	RRSP contributions			RRSP contributions		
Undeducted RRSPs - Jan to Feb	-			-		
Undeducted RRSPs - other periods	-			-		
RRSP contributions - Mar to Dec	-			-		
RRSP contributions - Jan to Feb	-			-		
Transfers to RRSP, PRPP, and SPP (Repayment of HBP)	-			-		
(Deducted)	- ∞			- ∞		
Closing	-			-		
	RRSP deduction limit			RRSP deduction limit		
RRSP deduction limit	-			-		
PRPP employer contributions (RRSP, PRPP, and SPP contributions deducted)	-			-		
RRSP deduction limit available	-			-		
Increase to RRSP limit from earned income (Unused RRSP contribution available to deduct)	-			-		
Available contribution room	-			-		
	Donations			Donations		
Donations	-			-		
Donations made in tax year	-			-		
Certified cultural property donated in tax year (Claimed)	- ∞			- ∞		
Closing	-			-		
	Discretionary amounts			Discretionary amounts		
	Input	Baseline	Maximum	Input	Baseline	Maximum
RRSP deduction	- ∞	-	-	- ∞	-	-
Net capital losses	- ∞	-	-	- ∞	-	-
AMT carry-forwards	- ∞	-	-	- ∞	-	-
Donations	- ∞	-	-	- ∞	-	-
Pension income splitting transferor	- ∞	-	-	- ∞	-	-
Total medical expenses to optimize	-	-	-	-	-	-
Attendant care - for first or single	-	-	-	-	-	-
Medical	-	-	-	-	-	-
Medical that eliminates disability - for first or single	-	-	-	-	-	-
Eligible dependant to claim	None	None	None	None	None	None

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

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 5		Taxpayer 6	
Description	Scenario 5		Scenario 6	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
Date of death				
	Taxable income		Taxable income	
Employment	-		-	
Old Age Security	-		-	
CPP or QPP benefits	-		-	
Eligible pension	-		-	
Pension split	- ∞		- ∞	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Interest and other investment	-		-	
Capital gains - proceeds	-		-	
(Capital gains - adjusted cost base)	-		-	
(Non-taxable portion)	-		-	
Other income	-		-	
Canada emergency response benefit	-		-	
Canada emergency student benefit	-		-	
Canada recovery benefit	-		-	
Canada recovery caregiving benefit	-		-	
Canada recovery sickness benefit	-		-	
Net business income (loss)	-		-	
Workers' compensation benefits	-		-	
Social assistance payments	- ∞		- ∞	
Net federal supplements	-		-	
Total income (loss)	-		-	
(Registered pension plan deduction)	-		-	
(RRSP deduction)	- ∞		- ∞	
(Pension split)	- ∞		- ∞	
(Childcare expenses)	-		-	
(Carrying charges and interest expenses)	-		-	
(CPP/QPP - enhancement)	-		-	
(CPP/QPP on business)	-		-	
(Other employment expenses)	-		-	
Net income before social benefits repayment	-		-	
(Social benefits repayment)	-		-	
Net income (loss)	-		-	
(Other payments deduction)	-		-	
(Net capital losses of other years)	- ∞		- ∞	
Taxable income (loss)	-		-	
	Tax On Split Income		Tax On Split Income	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Net capital gains	-		-	
(Non-taxable portion)	-		-	
Split income	-		-	
	Employment income details		Employment income details	
Employment income subject to CPP/QPP	-		-	
Other employment income elect into CPP/QPP	-		-	
Employment income subject to EI	-		-	
Self-employment income subject to EI	-		-	
	Tax credits and other amounts		Tax credits and other amounts	
Attendant care expenses	-		-	
Disability amount eligible	FALSE		FALSE	
Medical expenses	-		-	
Medical expenses that eliminate disability	-		-	
Social assistance payments	- ∞		- ∞	
Total income tax deducted	-		-	
Tax paid by instalments	-		-	

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

∞ - Client description

	Dependants			Dependants		
	Dependant 01			Dependant 01		
Name	Dependant 01			Dependant 01		
Marital status	Single			Single		
Province						
Date of birth						
Relationship	Child			Child		
Lived with taxpayer	TRUE			TRUE		
Shared custody	FALSE			FALSE		
Child support made during year	FALSE			FALSE		
Disability amount eligible	FALSE			FALSE		
Childcare expenses	-			-		
Net income	-			-		
Taxable income	-			-		
	Contributions and carryforwards			Contributions and carryforwards		
	Net capital losses			Net capital losses		
Net capital losses	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	Alternative minimum tax			Alternative minimum tax		
Alternative minimum tax	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	RRSP contributions			RRSP contributions		
Undeducted RRSPs - Jan to Feb	-			-		
Undeducted RRSPs - other periods	-			-		
RRSP contributions - Mar to Dec	-			-		
RRSP contributions - Jan to Feb	-			-		
Transfers to RRSP, PRPP, and SPP (Repayment of HBP)	-			-		
(Deducted)	- ∞			- ∞		
Closing	-			-		
	RRSP deduction limit			RRSP deduction limit		
RRSP deduction limit	-			-		
PRPP employer contributions (RRSP, PRPP, and SPP contributions deducted)	-			-		
RRSP deduction limit available	-			-		
Increase to RRSP limit from earned income (Unused RRSP contribution available to deduct)	-			-		
Available contribution room	-			-		
	Donations			Donations		
Donations	-			-		
Donations made in tax year	-			-		
Certified cultural property donated in tax year (Claimed)	- ∞			- ∞		
Closing	-			-		
	Discretionary amounts			Discretionary amounts		
	Input	Baseline	Maximum	Input	Baseline	Maximum
RRSP deduction	- ∞	-	-	- ∞	-	-
Net capital losses	- ∞	-	-	- ∞	-	-
AMT carry-forwards	- ∞	-	-	- ∞	-	-
Donations	- ∞	-	-	- ∞	-	-
Pension income splitting transferor	- ∞	-	-	- ∞	-	-
Total medical expenses to optimize	-	-	-	-	-	-
Attendant care - for first or single	-	-	-	-	-	-
Medical	-	-	-	-	-	-
Medical that eliminates disability - for first or single	-	-	-	-	-	-
Eligible dependant to claim	None	None	None	None	None	None

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

∞ - Client description

	Taxpayer details			Taxpayer details		
Name	Taxpayer 7			Taxpayer 8		
Description	Scenario 7			Scenario 8		
Marital status	Single			Single		
Province						
Year end	Dec 31, 2021			Dec 31, 2021		
Date of birth	Jan 1, 1980			Jan 1, 1980		
Date of death						
	Taxable income			Taxable income		
Employment	-			-		
Old Age Security	-			-		
CPP or QPP benefits	-			-		
Eligible pension	-			-		
Pension split	-	∞		-	∞	
Other than eligible dividends	-			-		
Gross-up	-			-		
Eligible dividends	-			-		
Gross-up	-			-		
Interest and other investment	-			-		
Capital gains - proceeds	-			-		
(Capital gains - adjusted cost base)	-			-		
(Non-taxable portion)	-			-		
Other income	-			-		
Canada emergency response benefit	-			-		
Canada emergency student benefit	-			-		
Canada recovery benefit	-			-		
Canada recovery caregiving benefit	-			-		
Canada recovery sickness benefit	-			-		
Net business income (loss)	-			-		
Workers' compensation benefits	-			-		
Social assistance payments	-	∞		-	∞	
Net federal supplements	-			-		
Total income (loss)	-			-		
(Registered pension plan deduction)	-			-		
(RRSP deduction)	-	∞		-	∞	
(Pension split)	-	∞		-	∞	
(Childcare expenses)	-			-		
(Carrying charges and interest expenses)	-			-		
(CPP/QPP - enhancement)	-			-		
(CPP/QPP on business)	-			-		
(Other employment expenses)	-			-		
Net income before social benefits repayment	-			-		
(Social benefits repayment)	-			-		
Net income (loss)	-			-		
(Other payments deduction)	-			-		
(Net capital losses of other years)	-	∞		-	∞	
Taxable income (loss)	-			-		
	Tax On Split Income			Tax On Split Income		
Other than eligible dividends	-			-		
Gross-up	-			-		
Eligible dividends	-			-		
Gross-up	-			-		
Net capital gains	-			-		
(Non-taxable portion)	-			-		
Split income	-			-		
	Employment income details			Employment income details		
Employment income subject to CPP/QPP	-			-		
Other employment income elect into CPP/QPP	-			-		
Employment income subject to EI	-			-		
Self-employment income subject to EI	-			-		
	Tax credits and other amounts			Tax credits and other amounts		
Attendant care expenses	-			-		
Disability amount eligible	FALSE			FALSE		
Medical expenses	-			-		
Medical expenses that eliminate disability	-			-		
Social assistance payments	-	∞		-	∞	
Total income tax deducted	-			-		
Tax paid by instalments	-			-		

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

∞ - Client description

	Dependants			Dependants		
	Dependant 01			Dependant 01		
Name	Dependant 01			Dependant 01		
Marital status	Single			Single		
Province						
Date of birth						
Relationship	Child			Child		
Lived with taxpayer	TRUE			TRUE		
Shared custody	FALSE			FALSE		
Child support made during year	FALSE			FALSE		
Disability amount eligible	FALSE			FALSE		
Childcare expenses	-			-		
Net income	-			-		
Taxable income	-			-		
	Contributions and carryforwards			Contributions and carryforwards		
	Net capital losses			Net capital losses		
Net capital losses	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	Alternative minimum tax			Alternative minimum tax		
Alternative minimum tax	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	RRSP contributions			RRSP contributions		
Undeducted RRSPs - Jan to Feb	-			-		
Undeducted RRSPs - other periods	-			-		
RRSP contributions - Mar to Dec	-			-		
RRSP contributions - Jan to Feb	-			-		
Transfers to RRSP, PRPP, and SPP (Repayment of HBP)	-			-		
(Deducted)	- ∞			- ∞		
Closing	-			-		
	RRSP deduction limit			RRSP deduction limit		
RRSP deduction limit	-			-		
PRPP employer contributions (RRSP, PRPP, and SPP contributions deducted)	-			-		
RRSP deduction limit available	-			-		
Increase to RRSP limit from earned income (Unused RRSP contribution available to deduct)	-			-		
Available contribution room	-			-		
	Donations			Donations		
Donations	-			-		
Donations made in tax year	-			-		
Certified cultural property donated in tax year (Claimed)	- ∞			- ∞		
Closing	-			-		
	Discretionary amounts			Discretionary amounts		
	Input	Baseline	Maximum	Input	Baseline	Maximum
RRSP deduction	- ∞	-	-	- ∞	-	-
Net capital losses	- ∞	-	-	- ∞	-	-
AMT carry-forwards	- ∞	-	-	- ∞	-	-
Donations	- ∞	-	-	- ∞	-	-
Pension income splitting transferor	- ∞	-	-	- ∞	-	-
Total medical expenses to optimize	-	-	-	-	-	-
Attendant care - for first or single	-	-	-	-	-	-
Medical	-	-	-	-	-	-
Medical that eliminates disability - for first or single	-	-	-	-	-	-
Eligible dependant to claim	None	None	None	None	None	None

∞ - Client description

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

	Taxpayer details		Taxpayer details	
Name	Taxpayer 1		Taxpayer 2	
Description	Scenario 1		Scenario 2	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
Date of death				
	Taxable income		Taxable income	
Employment	-		-	
Old Age Security	-		-	
CPP or QPP benefits	-		-	
Eligible pension	-		-	
Pension split	-	∞	-	∞
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Interest and other investment	-		-	
Capital gains - proceeds	-		-	
(Capital gains - adjusted cost base)	-		-	
(Non-taxable portion)	-		-	
Other income	-		-	
Canada emergency response benefit	-		-	
Canada emergency student benefit	-		-	
Canada recovery benefit	-		-	
Canada recovery caregiving benefit	-		-	
Canada recovery sickness benefit	-		-	
Net business income (loss)	-		-	
Workers' compensation benefits	-		-	
Social assistance payments	-	∞	-	∞
Net federal supplements	-		-	
Total income (loss)	-		-	
(Registered pension plan deduction)	-		-	
(RRSP deduction)	-	∞	-	∞
(Pension split)	-	∞	-	∞
(Childcare expenses)	-		-	
(Carrying charges and interest expenses)	-		-	
(CPP/QPP - enhancement)	-		-	
(CPP/QPP on business)	-		-	
(Other employment expenses)	-		-	
Net income before social benefits repayment	-		-	
(Social benefits repayment)	-		-	
Net income (loss)	-		-	
(Other payments deduction)	-		-	
(Net capital losses of other years)	-	∞	-	∞
Taxable income (loss)	-		-	
	Tax On Split Income		Tax On Split Income	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Net capital gains	-		-	
(Non-taxable portion)	-		-	
Split income	-		-	
	Employment income details		Employment income details	
Employment income subject to CPP/QPP	-		-	
Other employment income elect into CPP/QPP	-		-	
Employment income subject to EI	-		-	
Self-employment income subject to EI	-		-	
	Tax credits and other amounts		Tax credits and other amounts	
Attendant care expenses	-		-	
Disability amount eligible	FALSE		FALSE	
Medical expenses	-		-	
Medical expenses that eliminate disability	-		-	
Social assistance payments	-	∞	-	∞
Total income tax deducted	-		-	
Tax paid by instalments	-		-	

∞ - Client description

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

	Dependants			Dependants		
	Dependant 01			Dependant 01		
	Dependant 01			Dependant 01		
Name	Single			Single		
Marital status	Single			Single		
Province						
Date of birth						
Relationship	Child			Child		
Lived with taxpayer	TRUE			TRUE		
Shared custody	FALSE			FALSE		
Child support made during year	FALSE			FALSE		
Disability amount eligible	FALSE			FALSE		
Childcare expenses	-			-		
Net income	-			-		
Taxable income	-			-		
	Contributions and carryforwards			Contributions and carryforwards		
	Net capital losses			Net capital losses		
Net capital losses	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	Alternative minimum tax			Alternative minimum tax		
Alternative minimum tax	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	RRSP contributions			RRSP contributions		
Undeducted RRSPs - Jan to Feb	-			-		
Undeducted RRSPs - other periods	-			-		
RRSP contributions - Mar to Dec	-			-		
RRSP contributions - Jan to Feb	-			-		
Transfers to RRSP, PRPP, and SPP (Repayment of HBP)	-			-		
(Deducted)	- ∞			- ∞		
Closing	-			-		
	RRSP deduction limit			RRSP deduction limit		
RRSP deduction limit	-			-		
PRPP employer contributions (RRSP, PRPP, and SPP contributions deducted)	-			-		
RRSP deduction limit available	-			-		
Increase to RRSP limit from earned income (Unused RRSP contribution available to deduct)	-			-		
Available contribution room	-			-		
	Donations			Donations		
Donations	-			-		
Donations made in tax year	-			-		
Certified cultural property donated in tax year (Claimed)	- ∞			- ∞		
Closing	-			-		
	Discretionary amounts			Discretionary amounts		
	Input	Baseline	Maximum	Input	Baseline	Maximum
RRSP deduction	- ∞	-	-	- ∞	-	-
Net capital losses	- ∞	-	-	- ∞	-	-
AMT carry-forwards	- ∞	-	-	- ∞	-	-
Donations	- ∞	-	-	- ∞	-	-
Pension income splitting transferor	- ∞	-	-	- ∞	-	-
Total medical expenses to optimize	-	-	-	-	-	-
Attendant care - for first or single	-	-	-	-	-	-
Medical	-	-	-	-	-	-
Medical that eliminates disability - for first or single	-	-	-	-	-	-
Eligible dependant to claim	None	None	None	None	None	None

Prepared	Name	Date
Reviewed		
Approved		

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 3		Taxpayer 4	
Description	Scenario 3		Scenario 4	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
Date of death				
	Taxable income		Taxable income	
Employment	-		-	
Old Age Security	-		-	
CPP or QPP benefits	-		-	
Eligible pension	-		-	
Pension split	- ∞		- ∞	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Interest and other investment	-		-	
Capital gains - proceeds	-		-	
(Capital gains - adjusted cost base)	-		-	
(Non-taxable portion)	-		-	
Other income	-		-	
Canada emergency response benefit	-		-	
Canada emergency student benefit	-		-	
Canada recovery benefit	-		-	
Canada recovery caregiving benefit	-		-	
Canada recovery sickness benefit	-		-	
Net business income (loss)	-		-	
Workers' compensation benefits	-		-	
Social assistance payments	- ∞		- ∞	
Net federal supplements	-		-	
Total income (loss)	-		-	
(Registered pension plan deduction)	-		-	
(RRSP deduction)	- ∞		- ∞	
(Pension split)	- ∞		- ∞	
(Childcare expenses)	-		-	
(Carrying charges and interest expenses)	-		-	
(CPP/QPP - enhancement)	-		-	
(CPP/QPP on business)	-		-	
(Other employment expenses)	-		-	
Net income before social benefits repayment	-		-	
(Social benefits repayment)	-		-	
Net income (loss)	-		-	
(Other payments deduction)	-		-	
(Net capital losses of other years)	- ∞		- ∞	
Taxable income (loss)	-		-	
	Tax On Split Income		Tax On Split Income	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Net capital gains	-		-	
(Non-taxable portion)	-		-	
Split income	-		-	
	Employment income details		Employment income details	
Employment income subject to CPP/QPP	-		-	
Other employment income elect into CPP/QPP	-		-	
Employment income subject to EI	-		-	
Self-employment income subject to EI	-		-	
	Tax credits and other amounts		Tax credits and other amounts	
Attendant care expenses	-		-	
Disability amount eligible	FALSE		FALSE	
Medical expenses	-		-	
Medical expenses that eliminate disability	-		-	
Social assistance payments	- ∞		- ∞	
Total income tax deducted	-		-	
Tax paid by instalments	-		-	

Prepared	Name	Date
Reviewed		
Approved		

∞ - Client description

	Dependants			Dependants		
	Dependant 01			Dependant 01		
Name	Dependant 01			Dependant 01		
Marital status	Single			Single		
Province						
Date of birth						
Relationship	Child			Child		
Lived with taxpayer	TRUE			TRUE		
Shared custody	FALSE			FALSE		
Child support made during year	FALSE			FALSE		
Disability amount eligible	FALSE			FALSE		
Childcare expenses	-			-		
Net income	-			-		
Taxable income	-			-		
	Contributions and carryforwards			Contributions and carryforwards		
	Net capital losses			Net capital losses		
Net capital losses	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	Alternative minimum tax			Alternative minimum tax		
Alternative minimum tax	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	RRSP contributions			RRSP contributions		
Undeducted RRSPs - Jan to Feb	-			-		
Undeducted RRSPs - other periods	-			-		
RRSP contributions - Mar to Dec	-			-		
RRSP contributions - Jan to Feb	-			-		
Transfers to RRSP, PRPP, and SPP (Repayment of HBP)	-			-		
(Deducted)	- ∞			- ∞		
Closing	-			-		
	RRSP deduction limit			RRSP deduction limit		
RRSP deduction limit	-			-		
PRPP employer contributions (RRSP, PRPP, and SPP contributions deducted)	-			-		
RRSP deduction limit available	-			-		
Increase to RRSP limit from earned income (Unused RRSP contribution available to deduct)	-			-		
Available contribution room	-			-		
	Donations			Donations		
Donations	-			-		
Donations made in tax year	-			-		
Certified cultural property donated in tax year (Claimed)	- ∞			- ∞		
Closing	-			-		
	Discretionary amounts			Discretionary amounts		
	Input	Baseline	Maximum	Input	Baseline	Maximum
RRSP deduction	- ∞	-	-	- ∞	-	-
Net capital losses	- ∞	-	-	- ∞	-	-
AMT carry-forwards	- ∞	-	-	- ∞	-	-
Donations	- ∞	-	-	- ∞	-	-
Pension income splitting transferor	- ∞	-	-	- ∞	-	-
Total medical expenses to optimize	-	-	-	-	-	-
Attendant care - for first or single	-	-	-	-	-	-
Medical	-	-	-	-	-	-
Medical that eliminates disability - for first or single	-	-	-	-	-	-
Eligible dependant to claim	None	None	None	None	None	None

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 5		Taxpayer 6	
Description	Scenario 5		Scenario 6	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
Date of death				
	Taxable income		Taxable income	
Employment	-		-	
Old Age Security	-		-	
CPP or QPP benefits	-		-	
Eligible pension	-		-	
Pension split	- ∞		- ∞	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Interest and other investment	-		-	
Capital gains - proceeds	-		-	
(Capital gains - adjusted cost base)	-		-	
(Non-taxable portion)	-		-	
Other income	-		-	
Canada emergency response benefit	-		-	
Canada emergency student benefit	-		-	
Canada recovery benefit	-		-	
Canada recovery caregiving benefit	-		-	
Canada recovery sickness benefit	-		-	
Net business income (loss)	-		-	
Workers' compensation benefits	-		-	
Social assistance payments	- ∞		- ∞	
Net federal supplements	-		-	
Total income (loss)	-		-	
(Registered pension plan deduction)	-		-	
(RRSP deduction)	- ∞		- ∞	
(Pension split)	- ∞		- ∞	
(Childcare expenses)	-		-	
(Carrying charges and interest expenses)	-		-	
(CPP/QPP - enhancement)	-		-	
(CPP/QPP on business)	-		-	
(Other employment expenses)	-		-	
Net income before social benefits repayment	-		-	
(Social benefits repayment)	-		-	
Net income (loss)	-		-	
(Other payments deduction)	-		-	
(Net capital losses of other years)	- ∞		- ∞	
Taxable income (loss)	-		-	
	Tax On Split Income		Tax On Split Income	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Net capital gains	-		-	
(Non-taxable portion)	-		-	
Split income	-		-	
	Employment income details		Employment income details	
Employment income subject to CPP/QPP	-		-	
Other employment income elect into CPP/QPP	-		-	
Employment income subject to EI	-		-	
Self-employment income subject to EI	-		-	
	Tax credits and other amounts		Tax credits and other amounts	
Attendant care expenses	-		-	
Disability amount eligible	FALSE		FALSE	
Medical expenses	-		-	
Medical expenses that eliminate disability	-		-	
Social assistance payments	- ∞		- ∞	
Total income tax deducted	-		-	
Tax paid by instalments	-		-	

∞ - Client description

	Dependants			Dependants		
	Dependant 01			Dependant 01		
	Dependant 01			Dependant 01		
Name	Single			Single		
Marital status	Single			Single		
Province						
Date of birth						
Relationship	Child			Child		
Lived with taxpayer	TRUE			TRUE		
Shared custody	FALSE			FALSE		
Child support made during year	FALSE			FALSE		
Disability amount eligible	FALSE			FALSE		
Childcare expenses	-			-		
Net income	-			-		
Taxable income	-			-		
	Contributions and carryforwards			Contributions and carryforwards		
	Net capital losses			Net capital losses		
Net capital losses	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	Alternative minimum tax			Alternative minimum tax		
Alternative minimum tax	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	RRSP contributions			RRSP contributions		
Undeducted RRSPs - Jan to Feb	-			-		
Undeducted RRSPs - other periods	-			-		
RRSP contributions - Mar to Dec	-			-		
RRSP contributions - Jan to Feb	-			-		
Transfers to RRSP, PRPP, and SPP (Repayment of HBP)	-			-		
(Deducted)	- ∞			- ∞		
Closing	-			-		
	RRSP deduction limit			RRSP deduction limit		
RRSP deduction limit	-			-		
PRPP employer contributions (RRSP, PRPP, and SPP contributions deducted)	-			-		
RRSP deduction limit available	-			-		
Increase to RRSP limit from earned income (Unused RRSP contribution available to deduct)	-			-		
Available contribution room	-			-		
	Donations			Donations		
Donations	-			-		
Donations made in tax year	-			-		
Certified cultural property donated in tax year (Claimed)	- ∞			- ∞		
Closing	-			-		
	Discretionary amounts			Discretionary amounts		
	Input	Baseline	Maximum	Input	Baseline	Maximum
RRSP deduction	- ∞	-	-	- ∞	-	-
Net capital losses	- ∞	-	-	- ∞	-	-
AMT carry-forwards	- ∞	-	-	- ∞	-	-
Donations	- ∞	-	-	- ∞	-	-
Pension income splitting transferor	- ∞	-	-	- ∞	-	-
Total medical expenses to optimize	-	-	-	-	-	-
Attendant care - for first or single	-	-	-	-	-	-
Medical	-	-	-	-	-	-
Medical that eliminates disability - for first or single	-	-	-	-	-	-
Eligible dependant to claim	None	None	None	None	None	None

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 7		Taxpayer 8	
Description	Scenario 7		Scenario 8	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
Date of death				
	Taxable income		Taxable income	
Employment	-		-	
Old Age Security	-		-	
CPP or QPP benefits	-		-	
Eligible pension	-		-	
Pension split	- ∞		- ∞	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Interest and other investment	-		-	
Capital gains - proceeds	-		-	
(Capital gains - adjusted cost base)	-		-	
(Non-taxable portion)	-		-	
Other income	-		-	
Canada emergency response benefit	-		-	
Canada emergency student benefit	-		-	
Canada recovery benefit	-		-	
Canada recovery caregiving benefit	-		-	
Canada recovery sickness benefit	-		-	
Net business income (loss)	-		-	
Workers' compensation benefits	-		-	
Social assistance payments	- ∞		- ∞	
Net federal supplements	-		-	
Total income (loss)	-		-	
(Registered pension plan deduction)	-		-	
(RRSP deduction)	- ∞		- ∞	
(Pension split)	- ∞		- ∞	
(Childcare expenses)	-		-	
(Carrying charges and interest expenses)	-		-	
(CPP/QPP - enhancement)	-		-	
(CPP/QPP on business)	-		-	
(Other employment expenses)	-		-	
Net income before social benefits repayment	-		-	
(Social benefits repayment)	-		-	
Net income (loss)	-		-	
(Other payments deduction)	-		-	
(Net capital losses of other years)	- ∞		- ∞	
Taxable income (loss)	-		-	
	Tax On Split Income		Tax On Split Income	
Other than eligible dividends	-		-	
Gross-up	-		-	
Eligible dividends	-		-	
Gross-up	-		-	
Net capital gains	-		-	
(Non-taxable portion)	-		-	
Split income	-		-	
	Employment income details		Employment income details	
Employment income subject to CPP/QPP	-		-	
Other employment income elect into CPP/QPP	-		-	
Employment income subject to EI	-		-	
Self-employment income subject to EI	-		-	
	Tax credits and other amounts		Tax credits and other amounts	
Attendant care expenses	-		-	
Disability amount eligible	FALSE		FALSE	
Medical expenses	-		-	
Medical expenses that eliminate disability	-		-	
Social assistance payments	- ∞		- ∞	
Total income tax deducted	-		-	
Tax paid by instalments	-		-	

∞ - Client description

	Dependants			Dependants		
	Dependant 01			Dependant 01		
Name	Dependant 01			Dependant 01		
Marital status	Single			Single		
Province						
Date of birth						
Relationship	Child			Child		
Lived with taxpayer	TRUE			TRUE		
Shared custody	FALSE			FALSE		
Child support made during year	FALSE			FALSE		
Disability amount eligible	FALSE			FALSE		
Childcare expenses	-			-		
Net income	-			-		
Taxable income	-			-		
	Contributions and carryforwards			Contributions and carryforwards		
	Net capital losses			Net capital losses		
Net capital losses	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	Alternative minimum tax			Alternative minimum tax		
Alternative minimum tax	-			-		
Increase	-			-		
(Claimed)	- ∞			- ∞		
Closing	-			-		
	RRSP contributions			RRSP contributions		
Undeducted RRSPs - Jan to Feb	-			-		
Undeducted RRSPs - other periods	-			-		
RRSP contributions - Mar to Dec	-			-		
RRSP contributions - Jan to Feb	-			-		
Transfers to RRSP, PRPP, and SPP (Repayment of HBP)	-			-		
(Deducted)	- ∞			- ∞		
Closing	-			-		
	RRSP deduction limit			RRSP deduction limit		
RRSP deduction limit	-			-		
PRPP employer contributions (RRSP, PRPP, and SPP contributions deducted)	-			-		
RRSP deduction limit available	-			-		
Increase to RRSP limit from earned income (Unused RRSP contribution available to deduct)	-			-		
Available contribution room	-			-		
	Donations			Donations		
Donations	-			-		
Donations made in tax year	-			-		
Certified cultural property donated in tax year (Claimed)	- ∞			- ∞		
Closing	-			-		
	Discretionary amounts			Discretionary amounts		
	Input	Baseline	Maximum	Input	Baseline	Maximum
RRSP deduction	- ∞	-	-	- ∞	-	-
Net capital losses	- ∞	-	-	- ∞	-	-
AMT carry-forwards	- ∞	-	-	- ∞	-	-
Donations	- ∞	-	-	- ∞	-	-
Pension income splitting transferor	- ∞	-	-	- ∞	-	-
Total medical expenses to optimize	-	-	-	-	-	-
Attendant care - for first or single	-	-	-	-	-	-
Medical	-	-	-	-	-	-
Medical that eliminates disability - for first or single	-	-	-	-	-	-
Eligible dependant to claim	None	None	None	None	None	None

∞ - Client description

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

	Taxpayer details		Taxpayer details	
Name	Taxpayer 1		Taxpayer 2	
Description	Scenario 1		Scenario 2	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

∞ - Client description

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

	Federal taxes			Federal taxes		
(Basic personal amount)	(13,808)	15.00%	(2,071)	(13,808)	15.00%	(2,071)
Federal taxes			-			-

Prepared	Name	Date
Reviewed		
Approved		

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 3		Taxpayer 4	
Description	Scenario 3		Scenario 4	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

Client description
 Corporate and Personal Tax Scenario
 By Tax Templates Inc. Demo

Prepared	Name	Date
Reviewed		
Approved		

∞ - Client description

	Federal taxes			Federal taxes		
(Basic personal amount)	(13,808)	15.00%	(2,071)	(13,808)	15.00%	(2,071)
Federal taxes			-			-

∞ - Client description

	Taxpayer details			Taxpayer details		
Name	Taxpayer 5			Taxpayer 6		
Description	Scenario 5			Scenario 6		
Marital status	Single			Single		
Province						
Year end	Dec 31, 2021			Dec 31, 2021		
Date of birth	Jan 1, 1980			Jan 1, 1980		
	Cash summary			Cash summary		
Gross cash income	-			-		
Government benefits	-			-		
Other cash increases	-			-		
Other cash increases	-			-		
Other cash increases	-			-		
Other cash decreases	-			-		
Other cash decreases	-			-		
Net cash	-			-		
	Tax summary			Tax summary		
Federal taxes	-	∞		-	∞	
Provincial/territorial taxes	-	∞		-	∞	
Total taxes	-			-		

Client description
 Corporate and Personal Tax Scenario
 By Tax Templates Inc. Demo

- ∞ - Worksheet
- ∞ - T2
- ∞ - T1 Base
- ∞ - Base Results
- ∞ - T1 Marginal
- ∞ - Marginal Results
- ∞ - Total Results
- Base Results
- ∞ - Cash summary
- ∞ - Tax summary
- ∞ - Rate and carryforwards
- ∞ - Federal taxes
- ∞ - Provincial/territorial taxes
- ∞ - Refundable credits and payments

∞ - Client description

	Federal taxes			Federal taxes		
(Basic personal amount)	(13,808)	15.00%	(2,071)	(13,808)	15.00%	(2,071)
Federal taxes			-			-

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 7		Taxpayer 8	
Description	Scenario 7		Scenario 8	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

∞ - Client description

	Federal taxes			Federal taxes		
(Basic personal amount)	(13,808)	15.00%	(2,071)	(13,808)	15.00%	(2,071)
Federal taxes			-			-

∞ - Client description

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

	Taxpayer details		Taxpayer details	
Name	Taxpayer 1		Taxpayer 2	
Description	Scenario 1		Scenario 2	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

Client description
Corporate and Personal Tax Scenario
By Tax Templates Inc. Demo

- ∞ - Worksheet
- ∞ - T2
- ∞ - T1 Base
 - ∞ - Base Results
 - ∞ - T1 Marginal
 - ∞ - Marginal Results
 - ∞ - Total Results
- Marginal Results
 - ∞ - Cash summary
 - ∞ - Tax summary
 - ∞ - Rate and carryforwards
 - ∞ - Federal taxes
 - ∞ - Provincial/territorial taxes
 - ∞ - Refundable credits and payments

∞ - Client description

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

Prepared	Name	Date
Reviewed		
Approved		

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 3		Taxpayer 4	
Description	Scenario 3		Scenario 4	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

Client description
Corporate and Personal Tax Scenario
By Tax Templates Inc. Demo

Prepared	Name	Date
Reviewed		
Approved		

∞ - Client description

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 5		Taxpayer 6	
Description	Scenario 5		Scenario 6	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

Client description
Corporate and Personal Tax Scenario
By Tax Templates Inc. Demo

∞ - Worksheet	Marginal Results
∞ - T2	∞ - Cash summary
∞ - T1 Base	∞ - Tax summary
∞ - Base Results	∞ - Rate and carryforwards
∞ - T1 Marginal	∞ - Federal taxes
∞ - Marginal Results	∞ - Provincial/territorial taxes
∞ - Total Results	∞ - Refundable credits and payments

∞ - Client description

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 7		Taxpayer 8	
Description	Scenario 7		Scenario 8	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

∞ - Client description

∞ - Client description

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

	Taxpayer details		Taxpayer details	
Name	Taxpayer 1		Taxpayer 2	
Description	Scenario 1		Scenario 2	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

Client description
Corporate and Personal Tax Scenario
By Tax Templates Inc. Demo

- ∞ - Worksheet
- ∞ - T2
- ∞ - T1 Base
- ∞ - Base Results
- ∞ - T1 Marginal
- ∞ - Marginal Results
- ∞ - Total Results
- Total Results
 - ∞ - Cash summary
 - ∞ - Tax summary
 - ∞ - Rate and carryforwards
 - ∞ - Federal taxes
 - ∞ - Provincial/territorial taxes
 - ∞ - Refundable credits and payments

∞ - Client description

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

	Federal taxes			Federal taxes		
(Basic personal amount)	(13,808)	15.00%	(2,071)	(13,808)	15.00%	(2,071)
Federal taxes			- ∞			- ∞

Prepared	Name	Date
Reviewed		
Approved		

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 3		Taxpayer 4	
Description	Scenario 3		Scenario 4	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

Client description
 Corporate and Personal Tax Scenario
 By Tax Templates Inc. Demo

Prepared	Name	Date
Reviewed		
Approved		

∞ - Client description

	Federal taxes			Federal taxes		
(Basic personal amount)	(13,808)	15.00%	(2,071)	(13,808)	15.00%	(2,071)
Federal taxes			-			-

∞ - Client description

	Taxpayer details			Taxpayer details		
Name	Taxpayer 5			Taxpayer 6		
Description	Scenario 5			Scenario 6		
Marital status	Single			Single		
Province						
Year end	Dec 31, 2021			Dec 31, 2021		
Date of birth	Jan 1, 1980			Jan 1, 1980		
	Cash summary			Cash summary		
Gross cash income	-			-		
Government benefits	-			-		
Other cash increases	-			-		
Other cash increases	-			-		
Other cash increases	-			-		
Other cash decreases	-			-		
Other cash decreases	-			-		
Net cash	-			-		
	Tax summary			Tax summary		
Federal taxes	-	∞		-	∞	
Provincial/territorial taxes	-	∞		-	∞	
Total taxes	-			-		

Client description
 Corporate and Personal Tax Scenario
 By Tax Templates Inc. Demo

- ∞ - Worksheet
- ∞ - T2
- ∞ - T1 Base
- ∞ - Base Results
- ∞ - T1 Marginal
- ∞ - Marginal Results
- ∞ - Total Results
- Total Results
- ∞ - Cash summary
- ∞ - Tax summary
- ∞ - Rate and carryforwards
- ∞ - Federal taxes
- ∞ - Provincial/territorial taxes
- ∞ - Refundable credits and payments

∞ - Client description

	Federal taxes			Federal taxes		
(Basic personal amount)	(13,808)	15.00%	(2,071)	(13,808)	15.00%	(2,071)
Federal taxes			-			-

∞ - Client description

	Taxpayer details		Taxpayer details	
Name	Taxpayer 7		Taxpayer 8	
Description	Scenario 7		Scenario 8	
Marital status	Single		Single	
Province				
Year end	Dec 31, 2021		Dec 31, 2021	
Date of birth	Jan 1, 1980		Jan 1, 1980	
	Cash summary		Cash summary	
Gross cash income	-		-	
Government benefits	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash increases	-		-	
Other cash decreases	-		-	
Other cash decreases	-		-	
Net cash	-		-	
	Tax summary		Tax summary	
Federal taxes	-	∞	-	∞
Provincial/territorial taxes	-	∞	-	∞
Total taxes	-		-	

∞ - Client description

	Federal taxes			Federal taxes		
(Basic personal amount)	(13,808)	15.00%	(2,071)	(13,808)	15.00%	(2,071)
Federal taxes			-			-



	Taxpayer 1 Scenario 1 Dec 31, 2021 Total	Taxpayer 2 Scenario 2 Dec 31, 2021 Total	Taxpayer 3 Scenario 3 Dec 31, 2021 Total	Taxpayer 4 Scenario 4 Dec 31, 2021 Total	Taxpayer 5 Scenario 5 Dec 31, 2021 Total	Taxpayer 6 Scenario 6 Dec 31, 2021 Total	Taxpayer 7 Scenario 7 Dec 31, 2021 Total	Taxpayer 8 Scenario 8 Dec 31, 2021 Total
■ Federal taxes	-	-	-	-	-	-	-	-
■ Provincial taxes	-	-	-	-	-	-	-	-
■ Alternative minimum tax	-	-	-	-	-	-	-	-
■ CPP/EI	-	-	-	-	-	-	-	-
■ Social benefits repayment	-	-	-	-	-	-	-	-
■ (Refundable amounts)	-	-	-	-	-	-	-	-
■ (Transfer payments)	-	-	-	-	-	-	-	-