



## INFORMATION REQUIRED FOR *Tax Gross-up*

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### 1] Tax Returns

- Plaintiff's most recent tax return
- Survivor's most recent tax return (for a fatal accident case)

### [2] Changes expected in income

Any other income? (e.g. interest or dividend income) \$ \_\_\_\_\_

Anticipated absences (e.g. retraining, children: if children, from age \_\_\_\_\_ to age \_\_\_\_\_)

#### Retirement

- RRSP balance statement
- Pension plan contribution statement
- CPP contributor statement

### [3] Deductions from income

- Pension plan contributions (average per year) \$ \_\_\_\_\_
- RRSP contributions (average per year) \$ \_\_\_\_\_
- Union dues (average per year) \$ \_\_\_\_\_

### [4] Non refundable tax credits

- Spousal amount? Yes \_\_\_\_ No \_\_\_\_
- Equivalent to Spouse Yes \_\_\_\_ No \_\_\_\_
- Infirm Dependants? Yes \_\_\_\_ No \_\_\_\_
- Pension Income? Yes \_\_\_\_ No \_\_\_\_
- Medical Expense tax credit? Yes \_\_\_\_ No \_\_\_\_
- Disability credit? Yes \_\_\_\_ No \_\_\_\_
- Education and/or tuition amounts? Yes \_\_\_\_ No \_\_\_\_

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