



INFORMATION REQUIRED FOR *Tax Gross-up*

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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