



# Case Study - Submission

## Your Student Information

Last Name:

First Name:

E-mail Address:

**Answer the questions below. When completed "Print to PDF" and send to your instructor as an email attachment by the due date.**

**This Case Study is part of your final grade.**

**For further details on how to send your Case Study assignment to your instructor, refer to the Learner Guide in your transcript in uLearn.**

## Question 1 (34 points)

For each of the following income types and for each family member (if applicable):

- Itemize all amounts of this type (indicate who received it and how much);
- Determine how much of this income, if any, is required to be reported on a tax return;
- For each taxpayer, state the line(s) on the tax return or forms/schedules on which this should be reported and the total amount to be reported;
- If any item is not reportable for tax purposes, write "nil" and explain the reason why.

Group sickness or accident insurance plan benefit:

Enter text here...

WCB benefit:

Enter text here...

Inheritance:

Enter text here...

Remuneration from employer (salaries, wages, taxable benefits, etc.):

Enter text here...

Strike pay:

Enter text here...

Retiring allowance:

Enter text here...

Scholarship:

Enter text here...

Capital gain from sale of the house:

Enter text here...

Odd jobs:

Enter text here...

## Question 2 (6 points)

Who should report the bank interest of \$25 that each of the children received? Explain why.

Chelsea:

Enter text here...

Wayne:

Enter text here...

Derrick:

Enter text here...

### Question 3 (4 points)

Who should report the \$2,000 Jeremy had taken out of the RRSP that Sonja had contributed? And who can claim the withholding tax on the T4RSP? Explain why.

Enter text here...

### Question 4 (38 points)

Jeremy, Sonja and Derrick are all filing returns this year. For each of the following expense types:

- Itemize the claim (list all expenses of that type).
- State the total dollar amount, if any, which may be claimed and explain.
- Indicate which forms or schedules need to be completed for the claim.
- State the line number where the claim should be entered.
- Indicate on whose return it must be claimed: Jeremy, Sonja, or Derrick (if both Sonja and Jeremy are eligible to claim an item, write "either")

If any item cannot be claimed for tax purposes, explain why.

Child care:

Enter text here...

Moving expenses:

Enter text here...

Spousal RRSP contribution:

Enter text here...

Retiring allowance transfer to RRSP:

Enter text here...

Charitable donation:

Enter text here...

Disability supports:

Enter text here...

Home accessibility expenses:

Enter text here...

Medical expenses:

Enter text here...

Home buyers' amount:

Enter text here...

Union dues:

Enter text here...

## Question 5 (8 points)

For each of the following boxes on Jeremy's T4 slip, please answer:

- What does this box represent?
- On which line will it go on the tax return? If it is not to be entered on the tax return, state the reason why.

Box 38:

Enter text here...

Box 39:



Enter text here...

Box 66:

Enter text here...

Box 67:

Enter text here...

## Question 6 (4 points)

Calculate Derrick's total federal tuition amount.

- How much will he use on his return?
- What form or schedule does he have to complete?
- What can he do with his unused amount, if any? Explain your answer.

Enter text here...

## Question 7 (6 points)

Assume Jeremy will claim the children on his tax return. What is the maximum amount Jeremy can claim for each of the following? State the line number on which it should be claimed.

Canada caregiver amount for children under 18 years of age:

Enter text here...

Disability amount transferred from a dependant (not a spousal transfer):

Enter text here...