

2017 DIVIDEND PLANNING SCHEDULE

Please summarize the estimated 2017 income, including any dividends from your private company or companies, for each family member who is entitled to receive dividends from your private corporation either directly (as a shareholder) or indirectly (e.g. via a family trust that is a shareholder).

Family Name: _____

Name of your D&H Group LLP advisor: _____

	Individual A	Individual B	Individual C	Individual D	Individual E	Individual F
Name of individual:						
Estimated 2017 Year Income from:						
Employment						
Interest income						
Old Age Security Benefits						
CPP Benefits						
Other Pensions						
Capital Gains						
Public Company Dividends						
Rental income, net of expenses						
Dividend <u>payments made to date</u> from private companies (specify name of payer corporation)						

Other income (specify)						

Estimated 2017 Year Total income						

Estimated 2017 Year Deductions:						
RRSP Contributions						
Other deductions (specify)						

Estimated 2017 Year Total deductions						

Estimated 2017 net income (total income - total deductions)						
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Estimated 2017 Year Tax Credit Amounts						
Tuition						
Donations						
Medical expenses						
Other						
Estimated 2017 Year Total tax credit amounts						

SAMPLE

2017 DIVIDEND PLANNING SCHEDULE

Please summarize the estimated 2017 income, including any dividends from your private company or companies, for each family member who is entitled to receive dividends from your private corporation either directly (as a shareholder) or indirectly (e.g. via a family trust that is a shareholder).

Family Name:

Bill & Mary Smith

Name of your D&H Group LLP advisor:

Ted Jones

Name of individual:

	Individual A	Individual B	Individual C	Individual D	Individual E	Individual F
	Bill	Mary	Susan	Andrew		
Estimated 2017 Year Income from:						
Employment	\$ 100,000	\$ 110,000	\$ 4,500	\$ 6,000		
Interest income	500	500				
Old Age Security Benefits						
CPP Benefits						
Other Pensions						
Capital Gains	-	15,000	-	-		
Public Company Dividends						
Rental income, net of expenses						
Dividend payments made to date from private companies (specify name of payer corporation)						
<u>Smith Family Holdings Ltd.</u>	10,000	-	7,500	6,500		
Other income (specify)						
Estimated 2017 Year Total income	\$ 110,500	\$ 125,500	\$ 12,000	\$ 12,500		

Estimated 2017 Year Deductions:

RRSP Contributions	\$ 15,000	\$ 15,000	\$ -	\$ -		
Other deductions (specify)						
Estimated 2017 Year Total deductions	\$ 15,000	\$ 15,000	\$ -	\$ -		

Estimated 2017 net income (total income - total deductions)

	\$ 95,500	\$ 110,500	\$ 12,000	\$ 12,500		
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Estimated 2017 Year Tax Credit Amounts

Tuition	\$ -	\$ -	\$ 5,500	\$ 4,500		
Donations	500	2,500				
Medical expenses						
Other						
Estimated 2017 Year Total tax credit amounts	\$ 500	\$ 2,500	\$ 5,500	\$ 4,500		