

## Unit 2: Summative Task “U-Return Tax Services”

MEL4E

You have been hired by U-Return Tax Services to complete tax returns.  
The profile of your first client is as follows:

Title: Mr.
First Name: Stu
Surname: Dent
SIN: 046 454 286
Date of Birth: 21/01/1985
Marital Status: Single
Province of Residence: Ontario
Employment Income: 25 000
CPP contributions: 700
Employee’s EI premiums: 700
Income Tax Deducted: 5 000
EI insurable earnings: 25 000

Task 1: Complete Stu’s tax return.

Task 2: Check **Agree** or **Disagree**, in ink, in the **Before** category beside each statement of the Anticipation Guide.

Before		Statement	After	
Agree	Disagree		Agree	Disagree
		1. If Stu had a charitable donation of \$500, it would have a huge impact on his tax return.		
		2. If Stu had one dependent child, it would not impact his return.		
		3. If Stu’s income was double and his CPP, EI and Income Tax Deducted were all double than the outcome of the tax return would remain the same.		

## Unit 2: “U-Return Tax Services” (Continued)

Task 3: Complete Stu’s tax return with the donation of \$500.

Task 4: Complete Stu’s tax return as if he had one dependent child who is 6 years old.

Task 5: Complete Stu’s tax return as if his income was \$50 000,  
CPP contributions: \$1400  
Employee’s EI premiums: 1400  
Income Tax Deducted: 10 000

Task 6: Check **Agree** or **Disagree**, in ink, in the **After** category beside each statement of the Anticipation Guide.

Before		Statement	After	
Agree	Disagree		Agree	Disagree
		1. If Stu had a charitable donation of \$500, it would have a huge impact on his tax return.		
		2. If Stu had one dependent child, it would not impact his return.		
		3. If Stu’s income was double and his CPP, EI and Income Tax Deducted were all double than the outcome of the tax return would remain the same.		

Task 7: Write a brief explanation to accompany how your prediction held true or didn’t hold true for each of the three scenarios outlined in the Anticipation Guide.

## Unit 2: “U-Return Tax Services” (Continued)

	Level 1	Level 2	Level 3	Level 4
<b>Selecting Tools and Computational Strategies</b>				
<b>Selection and use of tools and strategies to solve a problem</b>	Selects and applies appropriate strategies to complete an income tax return with major errors or omissions	Selects and applies appropriate strategies to complete an income tax return with minor errors or omissions	Selects and applies appropriate strategies, accurately to complete an income tax return	Selects and applies the most appropriate strategies, accurately to complete an income tax return
<b>Connecting</b>				
<b>Relating mathematical ideas to situations drawn from other contexts</b>	Makes weak connections to create a tax return given new information.	Makes simple connections to create a tax return given new information.	Makes appropriate connections to create a tax return given new information.	Makes strong connections to create a tax return given new information.
<b>Reasoning and Proving</b>				
<b>Making inferences, conclusions, and justifications</b>	Justification of the answer has a limited connection to the Anticipation Guide.	Justification of the answer has some connection to the Anticipation Guide.	Justification of the answer has a direct connection to the Anticipation Guide.	Justification of the answer has a direct connection to the Anticipation Guide with evidence of reflection.
<b>Communication</b>				
<b>Degree of clarity in explanations and justifications in reporting</b>	Explanations and justifications are partially understandable.	Explanations and justifications are understandable to the teacher but would likely be unclear to others.	Explanations and justifications are clear for a range of audiences.	Explanations and justifications are particularly clear and detailed.