



Filing Returns at Death

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A PERSONAL NOTE OF WELCOME FROM EVELYN JACKS, PRESIDENT, KNOWLEDGE BUREAU

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Filing Returns at Death

OVERVIEW

Gain a good understanding of the preparation of returns in the year of death. You will learn what opportunities are available to decrease income tax in the year of death, lower probate fees, and reduce tax payable by beneficiaries.

Learn the skills to prepare the appropriate T1 returns for the year of death. You will be ready to provide advice to living clients about planning ahead to reduce taxes in the event of their death, spouse's death or another loved one.

This course deals comprehensively with the taxation of individuals at death. Gain a thorough understanding of how income, capital accumulations and registered investments are taxed on final returns and learn strategies to minimize taxes, including provincial probate fees. Where to report income received by the estate and after a taxpayer's death will be discussed.

You will learn how to manage the new relationship with CRA when taxpayers die, as well as how each type of income is reported, options regarding elective returns, and opportunities to defer taxes. Students will learn how to claim all deductions and credits that are allowed on each return for the deceased and the surviving spouse.

Adding expertise in the area of final and estate returns is a very timely and important professional to your tax practice. This has become increasingly in demand in our aging demographic and in post-pandemic times.

APPROACH

This course is beneficial for accounting, bookkeeping, tax, and financial advisors as we all work closely with seniors in our day-to-day practices. A general tax knowledge of T1 returns is recommended prior to enrolling in this course. Seniors, and their families, are looking for professional advice prior to or subsequent to a loved one's death. Death is an emotional time however it is also a financial event. Through the knowledge gained in this course, you will be better prepared to discuss the ramifications of death with clients and their family members.

This course will help you identify and discuss proactive tax strategies prior to and after death. You will be able to take advantage of the tax-saving opportunities presented by death, both in terms of personal and business finances. Students will gain the ability to prepare all mandatory and optional T1 returns in the year of death. You will be able to advise clients on how to best minimize or eliminate probate fees that are levied in most provinces. In those provinces that have high probate rates, this could be an extremely valuable service for your clients.

WHY IS THIS CONTENT ESPECIALLY TIMELY AND/OR IMPORTANT

Death is never timely yet it traditionally comes to about 1.5% of the Canadian population each year. Sadly, with the recent pandemic, this has increased with younger, unexpected deaths in Canada and around the world.

Smart advisors already know how to help their clients minimize the income tax consequences before death occurs. Gaining the technical expertise of filing the final return(s) of a deceased will ensure proper tax planning is arranged at the time of death.

Utilizing the fact that optional tax returns can drastically reduce the tax bill for a deceased taxpayer, their survivors and their estate is a big win for your clients.

Advisors who can offer this guidance are one step closer to becoming their clients' most trusted advisor. New tax changes will be included in the course content.

WHAT YOU WILL LEARN?

This course deals comprehensively with the taxation of individuals and their estates at death. The professional advisor will learn strategies on how to plan ahead and reduce tax liabilities through the use of mandatory and optional returns.

Pre-analyzing an estate's assets, and income and knowing how to claim these in the most tax-efficient manner is taught in this course. You will understand which income sources will stop, have to be repaid, or can be transferred tax-free to a spouse, dependent, or beneficiary.

Most provinces levy probate fees (on assets) as well as the tax owed on tax returns. The 'plan ahead strategies' discussed in this course to reduce or eliminate probate fees can drastically increase the tax efficiency of your clients' estates.

True-to-life case studies involve the preparation of tax returns for deceased taxpayers and their surviving spouses. All known tax changes, including those that are proposed for future tax years, are discussed in the Journal.

SCOPE OF THE CONTENT:

1. Death and Taxes
2. Returns in the Year of Death
3. Reporting Income
4. Capital Assets
5. Registered Accounts
6. Claiming Deductions
7. Non-Refundable Credits
8. Refundable Credits
9. The Estate
10. Avoiding Probate Fees

CHAPTER 1

DEATH AND TAXES

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

As you already know, taxpayers with taxable income need to file a tax return each year. In each tax practice, a small percentage of clients pass away each year. This first chapter provides an overview of the issues and required steps relating to the preparation of returns for those deceased taxpayers. The process of how registering authorization with CRA will be explained. For estates where a Graduated Rate Estate T3 Trust return is to be filed, you will learn how to apply for the required trust account number. In addition, students will learn about what to do with government cheques received after death.

NEW SKILLS TO BE MASTERED:

This chapter provides an overview of the concepts relating to the filing of tax returns for deceased taxpayers. Measurable skills will be developed in subsequent chapters.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What are the financial tasks to be performed when a person dies?
- Who do you inform when a taxpayer dies?
- How do you apply to be the legal representative of an estate?
- How do you apply for a T3 Trust account number?
- What government amounts received after death must be returned?
- What happens to income on which taxes were deferred prior to death?
- What happens to RRSP or RRIF assets in the year of death?
- How is income that accrues both prior to death and after death taxed?
- What deductions can be claimed on the final return?
- What refundable credits can be claimed on the final return?
- How does the deceased taxpayer's income in the year of death affect tax credits such as the GST/HST Credit and CCB received by survivors?
- What estate taxes are payable by Canadian residents?
- What assets (in some provinces) are subject to probate fees?
- How do you register authorization through the legal representative of the estate to the tax professional?

CHAPTER 2

RETURNS IN THE YEAR OF DEATH

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Responsibilities of the Executor regarding unfiled returns.
- What returns may be filed in the year of death.
- The due date for filing returns when a taxpayer dies.
- What options are available to pay any balance due.
- Why a Clearance Certificate should be obtained.

NEW SKILLS TO BE MASTERED:

- Preparation of a basic final return using professional tax software.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is the executor required to do if there are unfiled prior year returns outstanding when the taxpayer dies?
- How is the final return different from a normal return?
- What is the due date for the final tax return?
- What optional returns can be filed?
- When are the optional returns due?
- What is a “Right or Thing?”
- Which returns may be filed electronically, and which must be filed on paper?
- What happens if the taxpayer dies early in the year and the executor wants to file the final return before the forms for that year are available?
- If there is a balance due on the final return, when must it be paid?
- What is a Clearance Certificate, and why is one needed?
- How is the Notice of Assessment procedure changing?

CHAPTER 3

REPORTING INCOME

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- How to report income earned and paid prior to death.
- How to pension income split between spouses in the year of death.
- How to report income earned prior to death but not paid until after death.
- How to report income earned after death.
- How to report death benefits.
- How to report pandemic-related income and repayment, if required, on the final tax return.

NEW SKILLS TO BE MASTERED:

- Preparation of final returns for taxpayers with income other than registered or capital assets.
- Preparation of optional return for Rights or Things.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- How is employment income earned in the pay period prior to death but paid after death reported?
- How are accumulated sick leave benefits reported?
- How is vacation pay reported if it is paid after the taxpayer has died?
- How is a death benefit from an employer taxed?
- How is the CPP death benefit taxed?
- How is pension income splitting accomplished when the taxpayer was married and received pension income in the year of death?
- What happens to pandemic-related income and any required repayment in the year of death?
- Can pension income received by the survivor after the death of a spouse be split with the deceased spouse?

CHAPTER 4

CAPITAL ASSETS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- What happens when the deceased owned capital assets at the time of death?
- The income tax consequences when capital assets pass to the deceased spouse.
- What has to be reported in regards to a principal residence when a taxpayer dies?
- How are dividends declared prior to death, and paid out after death treated?
- How capital losses are dealt with in the year of death
- Treatment of loss carryforwards in the year of death
- How accrued losses can be utilized at death.
- What happens when the deceased was claiming a capital gains reserve in the year prior to death?
- How taxes on accrued gains can be minimized at death.
- What happens to capital gains and assets when both spouses die in the same year?
- The income tax consequences when a family farm or fishing business is transferred to a family member.

NEW SKILLS TO BE MASTERED:

- Preparation of final returns for taxpayers who have capital assets at death, including returns for single taxpayers and those with surviving spouses where assets are transferred to the survivor.
- Preparation of final returns for farmers and fishers where the family business is transferred to a family member at death.
- Preparation of the necessary forms to complete to comply with the reporting requirements for the sale or deemed disposition of a principal residence.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What happens when the taxpayer owned a principal residence at the time of death?
- What happens when a taxpayer owned other capital assets at the time of death?
- What is the ACB of a capital asset transferred to a surviving spouse at death?
- How can accrued losses be utilized at death?
- What happens when depreciable assets are owned at death?
- What is the ACB of farmland transferred to a family member?
- What is the ACB of depreciable farm assets when transferred to a family member at death?

CHAPTER 5

REGISTERED ACCOUNTS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- What happens to a TFSA at death?
- What happens when the deceased had RRSPs or RRIFs at the time of death?
- What options are available to spouses of a deceased spouse if they are an annuitant under an RRSP, RRIF or RPP?
- What options are available if the deceased had an outstanding balance under the Home Buyers' Plan or Lifelong Learning Plan at the time of death?
- What happens when a member of a Registered Pension Plan dies?
- What happens to registered accounts when both spouses die in the same year?
- What happens when the deceased is a RESP contributor or beneficiary of an RDSP?

NEW SKILLS TO BE MASTERED:

- Preparation of returns for taxpayers who have registered funds when they die.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What happens to TFSA assets when the TFSA holder dies?
- What happens when a Registered Pension Plan beneficiary dies?
- What happens when a withdrawal is made from a spousal RRSP in the year the contributing spouse dies?
- What happens at death when a taxpayer has RRSP or RRIF assets at the time of death, and there is a designated beneficiary?
- What happens at death when a taxpayer has RRSP or RRIF assets at the time of death, and there is no designated beneficiary?
- What elections are available to a surviving spouse regarding balances in the deceased taxpayer's RRSP?
- To what types of plans can RRSP balances at death be rolled over?
- What options are available to a surviving spouse regarding outstanding balances under the Home Buyers' Plan?
- What happens when a RESP contributor dies?
- What happens when a RDSP beneficiary dies?

CHAPTER 6

CLAIMING DEDUCTIONS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Which costs related to the funeral can be deducted?
- What deductions can be claimed on the final and optional returns in the year of death?
- What RRSP contributions can be made in the year of death?
- What RPP contributions can be made in the year of death?
- How outstanding securities options are treated in the year of death.
- How an outstanding employee home relocation loan is treated in the year of death
- CERB or CRB repayment

NEW SKILLS TO BE MASTERED:

- Preparation of returns for taxpayers who have deductions in the year of death.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What costs related to the funeral can be deducted?
- What is an eligible funeral arrangement, and what are the tax consequences of one?
- What deductions are allowed on the final return?
- What deductions are allowed on optional returns?
- What RRSP contributions can be claimed in the year of death?
- What RRSP contributions can be made after death and claimed on the final return?
- What RPP contributions can be made in the year of death?
- How are outstanding securities options treated in the year of death?
- How do you claim a deduction for a CRB repayment?

CHAPTER 7

NON-REFUNDABLE CREDITS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- How to maximize personal amounts by filing optional returns.
- How to transfer unused amounts in the year of death.
- How to claim medical expenses in the year of death.
- What special rules apply to charitable donations in the year of death?
- How do charitable bequests affect the deceased's tax return?

NEW SKILLS TO BE MASTERED:

- Preparation of returns for deceased taxpayers and their spouses, which include spousal transfers, claims for a spouse, medical expenses and charitable donations.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- On which of the possible returns in the year of death can the spousal amount be claimed?
- If claiming a spouse or eligible dependant, how much of the dependant's net income is used to determine the amount of the claim?
- In the year of death, which spouse may claim amounts transferred from a spouse?
- Can amounts be transferred to the final return from dependants other than the spouse?
- What medical expenses can be claimed in the year of death?
- What time frames apply to medical expenses in the year of death?
- What is the limit for deducting charitable donations in the year of death?
- What donations cannot be transferred to the surviving spouse?
- What new donations can individuals claim?
- What happens when donations exceed the limit?
- Where do you claim the Digital news subscription expenses?

CHAPTER 8

REFUNDABLE CREDITS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- How minimum tax affects the taxpayer's final return.
- How to claim the Canada Workers Benefit in the year of death.
- How to claim overpayments of CPP and EI in the year of death.
- How to claim the refundable medical expense supplement in the year of death.
- How to claim the new Canada Training credit in the year of death.
- How to claim the new Canadian Journalism labour tax credit in the year of death.
- How to claim the employee and partner GST/HST rebate in the year of death.
- Who can claim the GST Credit in the year that one spouse dies.
- What provincial credits can be claimed by a deceased taxpayer.

WHAT'S NEW?

- What has changed for Climate Action Incentive (participating provinces)

NEW SKILLS TO BE MASTERED:

- Preparation of returns for couples with refundable tax credits.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- If the taxpayer has a minimum tax carry-forward amount in the year of death, what happens to the unapplied balance?
- Can the Canada Workers Benefit be claimed in the year of death?
- Can the Canada Training credit be claimed in the year of death?
- Can the refundable Canadian journalism labour tax credit be claimed in the year of death?
- Can the refundable medical expense supplement be claimed in the year of death?
- Can the employee and partner GST/HST rebate be claimed in the year of death?
- Who must claim the provincial tax credits when one spouse dies?
- How has the payment of the CAI changed (in participating provinces)?

CHAPTER 9

THE ESTATE

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will learn how estate taxation differs from taxation of an individual taxpayer.
- You will learn what options are available to the personal representative of an estate to reduce and defer taxes on income earned after death.
- You will learn about a trust account number and how to apply for one.

WHAT'S NEW?

- Trust account numbers are now applied for electronically.

NEW SKILLS TO BE MASTERED:

- Understanding how an estate is taxed.
- Understanding strategies for making the most efficient tax plan following a person's death.
- Balancing the opportunities based on the circumstances of the deceased and the beneficiaries of the estate.
- Knowing the steps involved to apply for a Trust Account.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is a trust account number, and how do you apply for one?
- What rate of tax is applicable to income taxed in a trust?
- What personal amounts are available to a trust?
- What is the taxation year of a graduated rate estate (GRE) testamentary trust?
- When are instalments required to be paid by a GRE testamentary trust?
- What form is used to report income earned by a GRE testamentary trust?
- How is income flowed through to a beneficiary taxed?
- How is capital bequeathed to a beneficiary taxed?
- How many trusts may be created in one will?
- How can the choice of the trust year-end allow for the deferral of taxes?
- What is a Clearance Certificate?

CHAPTER 10

AVOIDING PROBATE FEES

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will learn what probate fees are. You will also be introduced to some planning strategies to minimize or eliminate probate fees in high-probate jurisdictions.

NEW SKILLS TO BE MASTERED:

- Understanding the assets and amounts subject to probate fees. Learn strategies to minimize or eliminate paying probate fees.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What are probate fees?
- Which provinces have probate fees?
- How are probate fees calculated?
- What options are available to minimize or eliminate probate fees?
- What strategies will provide the most savings?
- What are some drawbacks or risks involved with some of the strategies?

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1

Introduction to Personal Income Tax

This course introduces a proven process for consistently accurate T1 tax preparation services with a professional client interview and document management system, as well as a thorough understanding of tax preparation for the five anchor profiles upon which every personal tax return is based—credit filing, employees, families and children, investors, and seniors.

Knowledge Journal Topics:

- Intro to Income Taxation in Canada
- Using Software to Prepare the Return
- Filing the Return
- Low Income and Credit Filers
- Reporting Employment Income
- Claiming Employment Deductions
- Families and Children
- Reporting Investment Income
- Pensioners
- New for current tax year and beyond

2

Professional Income Tax Filing - Advanced

Fully updated to the latest federal Budgets, this comprehensive course delves deeply into the deductions, tax credits, and tax calculations on the personal tax return, with an emphasis on capital gains and losses, and registered and non-registered investment income sources. It overviews common and advanced client profiles, while sending students to the dynamic commentary in EverGreen Explanatory Notes.

Knowledge Journal Topics:

- Update and Review
- Family Filing
- Employees - Part 1
- Employees - Part 2
- Retirement
- Investors
- Asset Management
- Life Events
- Business Starts and Stops
- Death and Estate Planning

3

Filing Proprietorship Returns

This course for professional advisors uses CRA's prescribed forms: Statement of Business or Professional Activities, Capital Cost Allowance statements, worksheets for reporting home office, automobiles, other assets, inventory control, and cost of goods sold.

Knowledge Journal Topics:

- Taxation of Income from a Proprietorship
- Reporting Requirements: GST/HST
- Claiming Business Expenses
- Transactions Involving Business Assets
- Home-based Businesses
- Hiring Human Resources
- Inventory-Based Businesses
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4

Filing T3 Returns

This course introduces the types of trusts that may be created in Canada and how each of them is taxed. Students will learn how to prepare T3 returns as part of the case study exercises in the course. The students will also learn how to optimize taxes payable on income earned by at trust The Trust Tax Estimator tool, provided with this course, will help you to minimize taxes on trust income.

Knowledge Journal Topics:

- Introduction to Organizational Structures
- Consolidated and Combined Financial Statements
- Foreign Currency Transactions
- Purchase of a Business
- Sales of a Business
- The Sale of Assets
- The Sale of Shares
- Business Succession
- Tax Planning in Succession
- The Role of a Value Centered Accounting Function

5

Filing Final Returns at Death

This course deals comprehensively with the taxation of individuals at death and the new relationship with the CRA when taxpayers die. Gain a thorough understanding of how income and capital accumulations are taxed on final returns and learn strategies to minimize taxes.

Knowledge Journal Topics:

- Death and Taxes
- Returns in the Year of Death
- Reporting Income
- Capital Assets
- Registered Accounts
- Claiming Deductions
- Non-Refundable Credits
- Refundable Credits
- The Estate
- Avoiding Probate Fees

6

Investment Tax Strategies

This course covers a strategic and tax-efficient investment income planning process which places capital accumulations in the right hands of individuals in the family. The objective is to save capital and earn investment income with tax-efficiency and then to average down the tax paid on both by arranging to share with family members within the tax rules allowed.

Knowledge Journal Topics:

- Introduction to Real Wealth Management
- Tax Efficient Investing: Planning for Income and Capital
- Business Income and Asset Planning
- Introduction to Canadian Income Tax
- Growing and Preserving Tax Efficient Wealth
- Registered Investments
- Tax-Efficient Investments Income
- Real Estate
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- Evelyn Jacks, President of Knowledge Bureau

“Everything so far has had value to it. These studies have added to my knowledge and skills and I have put this knowledge to use immediately for our clients or I gained new skills which has given me the opportunity to expand our services.”

- William Samplonius, ON

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