

Self-Employed Checklist

Income:

Total Sales off invoices : \$ _____ (If you are a registered for GST, please indicate if this figure includes or excludes GST)

Inventory: \$ _____ (this figure should include any goods that were not sold by Dec 31st of the given tax year)

Expenses: (If you are a registered for GST, please indicate if these figure include or exclude GST)

*** Please provide the totals of the year for each expense listed below, if you did not have an expense simply leave blank ***

Advertising: \$ _____

Meals and Entertainment: \$ _____

Insurance (Business insurance only): \$ _____

Business tax, fees, licences, dues, memberships, and subscriptions: \$ _____

Supplies: \$ _____

Office Expenses: \$ _____

Bank Fee's (for an account used only for business purposes): \$ _____

Legal, accounting, and other professional fees: \$ _____

Salaries and/or subcontracting: \$ _____

WCB: \$ _____

Travel (hotels, ferry, airfare, etc.): \$ _____

Cell phone: \$ _____

Delivery, freight, and express: \$ _____

Purchases (Larger purchases such as computers, equipment, etc.): Please attached the receipt for the purchase(s).

Any other business expenses not listed above (please see next page for vehicle and home office expenses):

Name of expense: \$ _____

_____: \$ _____

In-Home Office Expenses:

*** Please provide the totals of the year for each expense listed below, if you did not have an expense simply leave blank ***

Sq. ft. of the office: _____ Total sq. ft. of the house: _____

Heat costs: \$ _____

Electricity: \$ _____

House insurance: \$ _____

Maintenance and repairs: \$ _____

Mortgage interest (*this amount can be found on your December mortgage statement*): \$ _____

Property taxes: \$ _____

Water/Sewer/Garbage: \$ _____

Utilities (telephone, internet, etc.): \$ _____

Any other related expenses:

_____: \$ _____

_____: \$ _____

Motor Vehicle Expenses:

*** If you have more than one vehicle used for business purposes please state which vehicle in the description portion, additional vehicle spots are listed on the next page. If only one is used simply leave the additional vehicle spots blank ***

*** Please provide the totals of the year for each expense listed below, if you did not have an expense simply leave blank ***

Vehicle #1 description: _____

Total KM driven in the year on vehicle: _____

Total KM driven in the year on vehicle for business purposes: _____

Fuel: \$ _____

Insurance: \$ _____

Licence and registration: \$ _____

Maintenance and repairs: \$ _____

If leasing a vehicle or financing a vehicle used for business purposes: Please attached the documents that state the interest paid on financing for the year, or leasing agreement

Vehicle #2 description: _____

Total KM driven in the year on vehicle: _____

Total KM driven in the year on vehicle for business purposes: _____

Fuel: \$ _____

Insurance: \$ _____

Licence and registration: \$ _____

Maintenance and repairs: \$ _____

If leasing a vehicle or financing a vehicle used for business purposes: Please attached the documents that state the interest paid on financing for the year, or leasing agreement

Vehicle #3 description: _____

Total KM driven in the year on vehicle: _____

Total KM driven in the year on vehicle for business purposes: _____

Fuel: \$ _____

Insurance: \$ _____

Licence and registration: \$ _____

Maintenance and repairs: \$ _____

If leasing a vehicle or financing a vehicle used for business purposes: Please attached the documents that state the interest paid on financing for the year, or leasing agreement