
**NON-INCORPORATED REALTORS
TAX PREPARATION CHECKLIST**

Name
Phone
Email

 Copy of your previous tax return
(for new clients only)

Business address

Business name

BN # (if applicable)

GST/HST # (if applicable)

Business income (net of GST/HST)

Business Expenses (Before GST/HST)

Advertising

Professional fees (accounting)

Website, Videos, Photos

Continuing Education

Meals & Entertainment

Client gift/promo materials

Insurance (RECO)

Assistant/Sub-contractor costs

 Business fees, licenses, dues, & Memberships
ie. OREB

Travel costs (seminars, events)

Cellphone

Expenses (Staging, listing, costs, etc)

Other expenses

Other expenses

Office expenses & supplies (CRM)

Business Use of Home Expenses % of Business Usage

Heat

Mortgage interest

Electricity

Property taxes

Insurance

Condo Fees

Maintenance

Internet and Home Phone

Motor Vehicle Expenses (we recommend using an app like "MileIQ" for tracking)

Total kilometres you drove or % of business usage

Insurance

License & registration

Kilometres you drove in the tax year to earn

Maintenance and repairs

Leasing cost

business income

Business parking fees

Fuel and oil

Other expenses (please specify)

Loan Interest

Capital Cost

Equipment & purchase dates