



SELF-EMPLOYMENT BUSINESS TAX PREPARATION CHECKLIST

Name
Phone
Email

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

Business name

GST/HST # (if applicable)

Your business income (net of GST/HST)

Business address

The main product or service of your business

BIN # (if applicable)

Business Expenses (Before GST/HST)

Purchase of materials

Subcontracts

Advertisements

Meals & Entertainment

Bad debts

Insurance

Interest

Business fees, licenses, dues, & Memberships

Professional fees

Management/Admin fees

Rent

Maintenance & repairs

Salaries, wages, & benefits

Travel

Telephone and utilities

Delivery, freight, and express

Other expenses

Other expenses

Other expenses

Office expenses

Office stationary & supplies

Business Use of Home Expenses (% of Business Usage)

Heat

Electricity

Insurance

Maintenance

Mortgage interest

Property taxes

Condo Fees

Internet and Phone

Motor Vehicle Expenses

Kilometres you drove in the tax year to earn business income

Total kilometres you drove

Fuel and oil

Loan Interest

Insurance

License & registration

Maintenance and repairs

Leasing cost

Business parking fees

Supplementary business insurance

Other expenses (please specify)

For loan interest & Leasing cost please provide purchase documents/financing documents

Capital Cost (each item over \$500)

Equipment & purchase dates (ex. computer, fax machine, printer, scanner)