



**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

Cellphone

Delivery, freight, and express

Supplementary business insurance

Office expenses

Office stationary & supplies

Other expenses

Other expenses

Business Use of Home Expenses (% of Business Usage)

Heat

Electricity

Insurance

Maintenance

Mortgage interest

Property taxes

Condo Fees

Internet and Phone

Motor Vehicle Expenses (% of Business Usage)

Total kilometres you drove

Fuel and oil

Loan Interest

Insurance

License & registration

Maintenance and repairs

Leasing cost

Business parking fees

Other expenses (please specify)

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

Capital Cost (list each item over \$500)

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