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## NON-INCORPORATED REALTORS TAX PREPARATION CHECKLIST

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**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

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

Assistant/Sub-contractor costs

Travel costs (seminars, events)

Listing Expenses

Cellphone

Office expenses & supplies (CRM)

Other expenses

Office Rent

Other expenses

Other expenses

### 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)

### % of usage

Total kilometres you drove

License & registration

Business income

Maintenance and repairs

Fuel and oil

Leasing cost

Loan Interest

Business parking fees

Insurance

Other expenses (please specify)

### Capital Cost (list each item over \$500)

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