

## SELF-EMPLOYED INFORMATION CHECKLIST (UNINCORPORATED BUSINESS)

Registered business name:  Partnership [yes/no]:

Date business commenced [mm/yy]:  Fiscal year-end [dd/mm/yy]:

GST registered [yes/no]:  Business #:

Do you purchase or dispose of any capital assets (furniture, equipment and computers) during the year? [Y/N]

If yes, please attach details and/or include invoices and receipts.

### ***NEW IN THE 2013 TAX YEAR:***

Since 2013, the CRA now requires that you provide information about you internet activities. You are required to report the following information (a) the number of internet pages or websites that you earn income from, (b) the website address of your website and any online advertising you do an (c) the percentage of your business that you generate from webpages and websites.

In order for us to report the appropriate information: please provide us with following information:

How many webpages and websites does your business earn income form?

Please list the main webpage:

What percentage of your gross income is generated from the webpage and websites?

%

(Apparently this even includes someone getting your phone number from the internet. Yes, I am serious!)

## STATEMENT OF INCOME AND EXPENSES

### Income

Sales, commissions, or fees  
(Excluding HST)

HST collected on sales  
(if included in sales figure above)

Other income (Please indicate source)

Are you using the GST/HST Quick Method? (Y/N)

**Is HST Included in the figures below?  
(Y/N)**

If you are registered for HST, *please* only  
provide us with the figures not including HST!

HST Paid should be tracked separately!

### Cost of Goods Sold (Excluding HST)

Opening Inventory

Purchases (net of returns)

Subcontracts

Direct Wage Costs

Other costs (provide details)

Ending Inventory

**Business Expenses (EXCLUDING HST)**

Advertising	<input type="text"/>
Meals and entertainment (total)	<input type="text"/>
Bad debts	<input type="text"/>
Insurance	<input type="text"/>
Interest	<input type="text"/>
Business tax, fees, licenses, dues, memberships	<input type="text"/>
Office expenses	<input type="text"/>
Supplies	<input type="text"/>
Legal, accounting and other professional fees	<input type="text"/>
Management and admin. Fees	<input type="text"/>
Rent	<input type="text"/>
Maintenance and repairs	<input type="text"/>
Salaries, wages, and benefits	<input type="text"/>
Travel	<input type="text"/>
Telephone and utilities <sup>(Note 1)</sup>	<input type="text"/>
Fuel costs (not for motor vehicles)	<input type="text"/>
Delivery, freight, courier	<input type="text"/>
Other (provide details)	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

NOTE 1: Includes telephone charges for a separate business or fax line, cell phone charges, business related long distance charges, business portion of internet access charges and utilities paid in relation to an office not in located inside your home (office in home expenses calculated below)

**WORK SPACE IN THE HOME:**

Area of home used for business (s.f.)

Total area of home (s.f.)

*PLEASE ENTER TOTAL COSTS - DO NOT PRORATE*

Heat

Electricity

Insurance

Maintenance and Repairs

Mortgage Interest (Not principal portion)

Property Taxes

Water

Security

Landscaping/snow removal

Other (provide details)

**AUTOMOBILE EXPENSES (Not Including HST)**

Make of vehicle

Date of acquisition

Date of disposition (if in the year)

Cost before GST/PST/HST

**Please provide purchase or lease agreement that details, as applicable, the purchase price, trade-in value, down payment and Manufacturers List Price.**

GST/PST/HST

Km driven for business

Km driven in year (total)

*PLEASE ENTER TOTAL COSTS  
DO NOT PRORATE*

Total expenses incurred

Fuel (gasoline and oil)

Maintenance and repairs

Insurance

License and registration

Interest

Monthly Lease Cost\*

Auto club (CAA)

Car washes

Parking

Other (provide details)