

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)

<p>Is HST Included in the figures below? (Y/N)</p> <p>If you are registered for HST, <i><u>please</u></i> only provide us with the figures not including HST!</p> <p>HST Paid should be tracked separately!</p>	
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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	_____
Meals and entertainment (total)	_____
Bad debts	_____
Insurance	_____
Interest	_____
Business tax, fees, licenses, dues, memberships	_____
Office expenses	_____
Supplies	_____
Legal, accounting and other professional fees	_____
Management and admin. Fees	_____
Rent	_____
Maintenance and repairs	_____
Salaries, wages, and benefits	_____
Travel	_____
Telephone and utilities ^(Note 1)	_____
Fuel costs (not for motor vehicles)	_____
Delivery, freight, courier	_____
Other (provide details)	_____
_____	_____
_____	_____
_____	_____

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	_____	_____
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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)	_____	_____