

# SELF-EMPLOYED & PROFESSIONAL INCOME INFORMATION CHECKLIST (UNINCORPORATED BUSINESS REGISTERED FOR HST & HAVE TRACKED)

## 1. General Information

Name of Business:

Address same as on Return?  Yes  No

If NO, please provide address in space below:

Fiscal Period:  TO   
Date Date

Do you purchase or dispose of any capital assets  
(furniture, equipment and computers) during the year?  Yes  No

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

## 2. Website Information

Since 2013, the CRA requires that you provide information about your 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; and
- (c) the percentage of your business that you generate from webpages and websites.

How many webpages does your business earn income from?

Please list the address(es) of your main web page(s):

What percentage of your gross income is generated from webpages:

## 3. HST Registration Information

### Instructions:

Please use the following sheets to summarize your business income and expenses and the HST figures that you have tracked separately.

## 4. Statement of Income and Expenses (Registered for HST & Tracked)

	TOTAL BEFORE HST	HST COLLECTED
Total Sales Commissions or Fees:	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Other Income: (please provide details):		
<input style="width: 95%;" type="text"/>	<input style="width: 5%;" type="text"/>	<input style="width: 5%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 5%;" type="text"/>	<input style="width: 5%;" type="text"/>

	TOTAL BEFORE HST	HST PAID
Expenses:		
Advertising	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Meals and entertainment (Please do not prorate)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Bad debts	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Insurance	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Interest	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Business tax, fees, licenses, dues, memberships	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Office expenses	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
(Please provide details of expenses over \$500)		
Supplies	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Legal, accounting and other professional fees	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Management and admin. Fees	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Rent	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Maintenance and repairs	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Salaries, wages, and benefits	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Travel	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Cell Phone	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Please provide business use %	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Internet	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Please provide business use %	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Fuel costs (not for motor vehicles)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Delivery, freight, courier	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Other (provide details)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 5%;" type="text"/>	<input style="width: 5%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 5%;" type="text"/>	<input style="width: 5%;" type="text"/>

Sub-Total	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
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## 5. Motor Vehicle Expenses (Registered for HST & Tracked)

Make of Vehicle

Date of Acquisition

Date of Disposition

If you have acquired a new vehicle or lease during the year, please be sure to provide us the purchase agreement, financing agreement and/or lease agreement. Please ensure you also provide us with information regarding the disposal of your old vehicle.

**If you have multiple vehicles that you use for business, please email us for additional worksheets that you can utilize.**

KM Driven for business

Total KM Driven during the year

*Please note, CRA requires you maintain a log of all your business KM and total KM travelled during the year. It is your responsibility to provide this log to CRA should they request. If you have questions, please email the office with any questions*

	<b>TOTAL BEFORE HST</b>	<b>HST PAID</b>
Fuel	<input type="text"/>	<input type="text"/>
Maintenance and repairs	<input type="text"/>	<input type="text"/>
Insurance	<input type="text"/>	<input type="text"/>
License and registration	<input type="text"/>	<input type="text"/>
Interest	<input type="text"/>	<input type="text"/>
Lease costs	<input type="text"/>	<input type="text"/>
Auto Club (eg CAA)	<input type="text"/>	<input type="text"/>
Car Washes	<input type="text"/>	<input type="text"/>
Parking	<input type="text"/>	<input type="text"/>
Sub-Tota	<input type="text"/>	<input type="text"/>

## 6. Work Space in Home

Area of Home Used for Business (sqft)

Total area of home (sqft)

Expenses:

Heat

Electricity

Insurance

Maintenance and repairs

Mortgage Interest (Please do not include principal repayments)

Property Taxes

Water

Security

Rent

Other (provide details)

Total