

**SELF-EMPLOYED & PROFESSIONAL INCOME INFORMATION CHECKLIST
(UNINCORPORATED BUSINESS REGISTERED FOR HST BUT HAVE NOT 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 form?

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. You will be utilizing the same forms as individuals not registered for HST. Simply enter the totals for all the expenses that include the HST.

Please provide us with following details:

Total Sales Commissions or Fees:

Total HST Collected:

Please note that CRA may ask to see your receipts and details of the ITC's being claimed. It is your responsibility to provide this information to the CRA. We can not be held responsible for any differences between the HST return and the totals per the receipts.

By using providing us with the summarized information, you accept these terms and accept full responsibility for the filing.

4. Statement of Income and Expenses (Not Registered for HST)

Total Sales Commissions or Fees:

Other Income: (please provide details):

Expenses:

Advertising	<input style="width: 100%; height: 20px;" type="text"/>
Meals and entertainment (Please do not prorate)	<input style="width: 100%; height: 20px;" type="text"/>
Bad debts	<input style="width: 100%; height: 20px;" type="text"/>
Insurance	<input style="width: 100%; height: 20px;" type="text"/>
Interest	<input style="width: 100%; height: 20px;" type="text"/>
Business tax, fees, licenses, dues, memberships	<input style="width: 100%; height: 20px;" type="text"/>
Office expenses	<input style="width: 100%; height: 20px;" type="text"/>
(Please provide details of expenses over \$500)	
Supplies	<input style="width: 100%; height: 20px;" type="text"/>
Legal, accounting and other professional fees	<input style="width: 100%; height: 20px;" type="text"/>
Management and admin. Fees	<input style="width: 100%; height: 20px;" type="text"/>
Rent	<input style="width: 100%; height: 20px;" type="text"/>
Maintenance and repairs	<input style="width: 100%; height: 20px;" type="text"/>
Salaries, wages, and benefits	<input style="width: 100%; height: 20px;" type="text"/>
Travel	<input style="width: 100%; height: 20px;" type="text"/>
Cell Phone	<input style="width: 100%; height: 20px;" type="text"/>
Please provide business use %	<input style="width: 100%; height: 20px;" type="text"/>
Internet	<input style="width: 100%; height: 20px;" type="text"/>
Please provide business use %	<input style="width: 100%; height: 20px;" type="text"/>
Fuel costs (not for motor vehicles)	<input style="width: 100%; height: 20px;" type="text"/>
Delivery, freight, courier	<input style="width: 100%; height: 20px;" type="text"/>
Other (provide details)	<input style="width: 100%; height: 20px;" type="text"/>
<input style="width: 55%; height: 20px;" type="text"/>	<input style="width: 45%; height: 20px;" type="text"/>
<input style="width: 55%; height: 20px;" type="text"/>	<input style="width: 45%; height: 20px;" type="text"/>
 Sub-Total	<input style="width: 100%; height: 20px;" type="text"/>

5. Motor Vehicle Expenses (Not Registered for HST)

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

Fuel

Maintenance and repairs

Insurance

License and registration

Interest

Lease costs

Auto Club (eg CAA)

Car Washes

Parking

Sub-Total

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