

SELF-EMPLOYED & PROFESSIONAL INCOME INFORMATION CHECKLIST

1. General Information *(UNINCORPORATED BUSINESS NOT REGISTERED FOR HST)*

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

In 2020, did you make a claim for the Temporary Wage Subsidy? Yes No

If you answered "YES",

(a) How much did you claim in 2020?

(b) Please attach a copy of your PD27.

In 2020, did you make a claim for the Canada Emergency Wage Subsidy? Yes No

If you answered "YES",

(a) How much did you claim in your filings up to and including December 19, 2020?

(b) Please attach a copy of CEWS filings you made in 2020.

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

Total Sales Commissions or Fees:

Other Income: (please provide details):

Expenses:

Advertising

Meals and entertainment (Please do not prorate)

Bad debts

Insurance

Interest

Business tax, fees, licenses, dues, memberships

Office expenses (Please provide details of expenses over \$500)

Supplies

Legal, accounting and other professional fees

Management and admin. Fees

Rent

Maintenance and repairs

Salaries, wages, and benefits

Travel

Cell Phone

Please provide business use %

Fuel costs (not for motor vehicles)

Delivery, freight, courier

Other (provide details)

Sub-Total

4. Motor Vehicle Expenses (Not Registered for HST)

Make of Vehicle

Date of Acquisition

Date of Disposition

If you have acquired an new vehicle of 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

5. 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

Internet

Other (provide details)

Total