

Self Employment Income Checklist

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To assist us in the preparation of your Personal Income Tax Return, please complete this form and attach the supporting documentation. (Optional – total receipts by category and attach a calculator tape.)

In the event of an audit, the onus of proof is on the taxpayer; unsupported claims may be denied.

Information

Name: _____

Business Name: _____

Business Address: _____

Main Product or Service: _____

Sole Proprietorship

Partnership Co-ownership name & SIN: _____

Percentage of Ownership: _____

Full Year Y N If NO, Fiscal Period: ____ / ____ / ____

Is the Business registered for GST? Y N Business Number: _____

Income

Sales of Goods and Services: _____ Sales of Capital assets: _____

Taxes

PST returns for the year: _____

GST returns for the year: _____

Include statements and correspondence received

Capital Costs

Capital outlays are considered to be of lasting nature; the full amount cannot be deducted in the year acquired.

<input type="checkbox"/> Computer Equipment	<input type="checkbox"/> Vehicle
<input type="checkbox"/> Computer Software	<input type="checkbox"/> Other
<input type="checkbox"/> Equipment, Furniture, and Tools	

Cost of Sales

Closing Inventory at December 31 (at cost) _____ Purchases of Goods for Resale _____

Expenses

<input type="checkbox"/> Advertising	<input type="checkbox"/> Office Supplies
<input type="checkbox"/> Bad Debts	<input type="checkbox"/> Private Health Service Plan Premiums
<input type="checkbox"/> Business Licenses, Dues and Memberships	<input type="checkbox"/> Professional Fees (legal and accounting)
<input type="checkbox"/> Convention (max 2 per year)	<input type="checkbox"/> Rent and Property Taxes (for leased premises)
<input type="checkbox"/> Delivery and Freight	<input type="checkbox"/> Salaries and Benefits
<input type="checkbox"/> Insurance	<input type="checkbox"/> Supplies
<input type="checkbox"/> Interest and Bank Charges	<input type="checkbox"/> Telephone
<input type="checkbox"/> Maintenance and Repairs (except motor vehicles)	<input type="checkbox"/> Travel (airfare, lodging, taxi, transit, etc.)
<input type="checkbox"/> Management and Administration Fees	<input type="checkbox"/> Utilities
<input type="checkbox"/> Meals and Entertainment (include travel and convention meals)	<input type="checkbox"/> Other

