

Name _____

Business Income & Expenses

Tax Year _____

New clients please attach prior year tax return

Please provide full totals for tax year, including HST

BUSINESS NAME:	
MAIN PRODUCT/SERVICE:	PARTNERSHIP <input type="checkbox"/> YES <input type="checkbox"/> NO
BUSINESS HST NUMBER (if applicable)	HST ACCESS CODE#
BUSINESS START DATE: _____	BUSINESS END DATE: _____

BUSINESS INCOME	TOTAL BUSINESS INCOME (including HST)	
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COST OF GOODS SOLD	OPENING INVENTORY - JANUARY 1 ST	
	MATERIAL PURCHASES	
	LABOUR / SUBCONTRACTORS	
	CLOSING INVENTORY - DECEMBER 31 ST	

OPERATING COSTS	ADVERTISING / GIFTS / WEBSITE	
	CLIENT MEALS/ENTERTAINMENT	
	BUSINESS INSURANCE	
	INTEREST ON BUSINESS LOAN	
	BUSINESS BANK FEES	
	PROFESSIONAL DUES / LICENSES	
	LEGAL AND ACCOUNTING FEES	
	OFFICE AND GENERAL EXPENSES	
	SUPPLIES	
	SALARIES / WAGES	
	OFFICE / STORE RENT	
	MAINTENANCE / REPAIRS (office equipment/store)	
	CELL PHONE (BUSINESS % ONLY)	
	BUSINESS TRAVEL (meals, hotel, flight, etc.)	
	TRAINING / CONVENTIONS	
OTHER:		

BUSINESS ASSETS PURCHASED IN TAX YEAR ie. Computer		

Name _____

Business Income & Expenses

<input type="checkbox"/> OWN VEHICLE <input type="checkbox"/> FINANCED	DATE PURCHASED	
	PURCHASE PRICE	
	*ATTACH PURCHASE AGREEMENT FOR NEW VEHICLE/NEW CLIENT	

LEASE VEHICLE	START DATE	
	END DATE	
	LEASE PAYMENTS	

VEHICLE EXPENSES PLEASE INCLUDE FULL TOTALS FOR THE YEAR. WE WILL REDUCE THESE NUMBERS TO BUSINESS PERCENTAGE.	YEAR/MAKE/MODEL:	
	ENTER TOTAL KM DRIVEN IN TAX YEAR _____ km	
	ENTER TOTAL KM DRIVEN FOR BUSINESS _____ km _____ Bus %	
	GAS / FUEL	
	REPAIRS & MAINTENANCE	
	VEHICLE INSURANCE	
	LICENCE & REGISTRATION ANNUAL FEE	
	CAR WASHES	
	TOLLS (407)	
	PARKING	
	INTEREST ON CAR LOAN (FINANCED)	
OTHER		

HOME OFFICE PLEASE INCLUDE FULL TOTALS FOR THE YEAR. WE WILL REDUCE THESE NUMBERS TO BUSINESS PERCENTAGE.	AREA OF HOME USED FOR BUSINESS	
	TOTAL AREA OF HOME	
	HEAT	
	HYDRO	
	WATER	
	INSURANCE	
	INTERNET	
	MORTGAGE INTEREST	
	MAINTENANCE OF BUSINESS SPACE	
	RENT OR PROPERTY TAXES	

Keep all receipts for 6 years. Information may be subject to review by CRA. Tax return prepared based on information provided.

Client Signature: _____