

SELF EMPLOYMENT / PROFESSIONAL
WORKSHEET TAX YEAR _____

YOUR NAME: _____

BUSINESS NAME: _____

PLEASE COMPLETE SEPARATE FORM FOR EACH BUSINESS OR PROFESSION

Canada Revenue Agency Programs Registration

Are you registered for [EI Special Benefits for self-employed people](#)?
 GST/HST Registered? (provide number) _____
 Do you want us to prepare your HST return? (provide a copy of your HST form)
 Are you using Quick Method calculation? Do the amounts below include HST?

Websites

How many websites does your business earn income from? _____
 Percentage of gross income generated from websites? _____ %
 Provide five (5) main webpage addresses or URL's: _____

Income / Inventory

Professional Fees including work-in-progress (WIP) _____
 OR
 Gross Sales, Commissions or Fees _____
 Opening Inventory (dollar value) _____
 Material/product purchases _____
 Direct Wages _____
 Sub-contracts _____
 Closing Inventory (dollar value) _____

Expenses

Advertising _____
 Meals and Entertainment _____
 Bad Debts and Collection Costs _____
 Insurance _____
 Interest and Bank Charges _____
 Business Taxes, Fees, Licences, Dues, etc. _____
 Office Expenses (telephone, etc) _____
 Office Stationery and Supplies _____
 Fees for Professional Services _____
 Management and Administration Fees _____
 Rent (attach lease agreements) _____
 Repairs and Maintenance _____
 Salary and Benefits (including CPP and EI paid) _____
 Property Taxes _____
 Travel Expenses _____
 Utilities (heat, hydro and water) _____
 Fuel Costs (except for motor vehicles) _____
 Delivery and Freight Charges _____
 Other Expenses (specify) _____

Property and Equipment

Equipment Acquisitions *(attach list and receipts)* _____
 Asset Purchases *(attach list and receipts)* _____
 Dispositions *(attach list, dates and amounts)* _____

Home Office Expenses (if place of business)

Square Footage of Total Home _____
 Square Footage of Business Use Space _____
 Heat _____
 Electricity _____
 Home Insurance _____
 Maintenance, Fees and Repairs _____
 Mortgage Interest _____
 Rent or Property Tax _____
 Other expenses *(specify)* _____

PLEASE COMPLETE SEPARATE LIST FOR EACH VEHICLE

Automobile Expenses

Additions or Disposals of Vehicles _____
(provide purchase agreements, sales proceeds and dates)
 Make, Model and Model Year _____
 Zero Emission Electric or Plug-in Hybrid *(describe)* _____
 Purchased/Owned *(provide financing agreement)* _____
 Leased *(provide lease agreement)* _____
 Fuel Expenses _____
 Interest on Passenger Vehicle/Automobile _____
 Interest on Other Type Motor Vehicle _____
 Vehicle Insurance _____
 Licence and Registration _____
 Maintenance and Repairs _____
 Leasing Costs _____
 Other Expenses *(please describe)* _____

Vehicle Mileage

PLEASE NOTE THAT IF VEHICLE EXPENSES ARE REVIEWED BY CRA, YOUR VEHICLE MILEAGE LOG WILL BE REQUIRED

Odometer Reading at Beginning of Year _____
 Odometer Reading at End of Year _____
 Total Kilometers for the Year _____
 Business Kilometers Driven _____
(retain vehicle mileage log to support claim)

FOR ADDITIONAL INFORMATION, THE CRA WEBSITE HAS INFORMATION ABOUT:

[Sole proprietorships and partnerships](#)

[Business expenses](#)

[Motor vehicle expenses](#)

[Business records](#)

[Motor vehicle records](#)

[Guide: T4002 Self-employed Business, Professional, Commission, Farming and Fishing Income](#)

[Other CRA Publications and Guides for Taxpayers](#)

And the Koroll & Company website is a great resource for tax information! www.koroll.ca

