

Please do not send sensitive information via email.

Deadline to pay tax and GST – April 30, 2017

Deadline to file – June 15, 2017

To assist in the preparation of your 2016 Personal Income Tax Return, please complete this form and keep all supporting documentation.

Name _____ Year _____
 Address _____ Telephone _____
 Email _____ GST Number _____
 Main Product or Service _____ % of Ownership _____

Self -Employment Income & Expenses 2016

	Total	GST (if applicable)	Net
Sales (Jan 1 – Dec 31)			
Purchases during the year (raw materials)			
Subcontractors			
Advertising			
Meals and entertainment			
Bad debts (receivables that became uncollectable)			
Insurance (non-vehicle)			
Interest & bank charges		N/A	
Business tax, licenses, & memberships			
Office expenses			
Supplies			
Legal & accounting fees			
Management fees			
Business rent (exclude home-office rent)			
Maintenance and repairs (non-vehicle)			
Wages and benefits (including CPP, EI, WCB)			
Property taxes (exclude home-office)		N/A	
Business travel & accommodations			
Cellphone & business telephone			
Delivery, freight and courier			
Internet			
Other expenses ()			
Purchases over \$500:			
Computer / laptop			
Equipment (description:)			
Furniture (description:)			
New automobile (see next page)			

Confidential when completed.

Use of Personal Vehicle to Earn Business Income

Vehicle description (year, make, model) _____

Vehicle - Owned

Purchase price _____
 Date of purchase _____
 Current value vehicle _____
 Kms driven for business _____
 Total kms driven in the year _____

Vehicle -Leased

Date lease starts _____
 Date lease ends _____
 Manufacturer's list price _____

	Total Costs 100%	GST	Net
Auto: Fuel			
Auto: Interest on vehicle financing		N/A	
Auto: Insurance		N/A	
Auto: License and registration			
Auto: Maintenance and repairs			
Auto: Lease payments			
Auto: Business parking			
Auto: Supplementary business insurance		N/A	

Did you **sell or trade-in** your vehicle during the year? Y / N

If your vehicle was **leased, purchased or sold** in the year, please provide all documents.

***NOTE:** 1) For vehicle travel to be a **deductible** expense, the C.R.A requires that you maintain a **mileage log** recording your mileage. For business purposes (be sure to keep a record of the odometer reading of your vehicle at the start and end of the year). 2) C.R.A. considers travel to and from your home and normal place of work to be **personal travel**.*

Use of Home-Office to Earn Business Income

Sq. ft. of home used for office _____ Total sq. ft. of home _____

NOTE: You may only claim expenses for using part of your home as a place of business if either your home office is:

- your principal place of business; or
- used exclusively to earn business income on a regular and continuous basis for meeting clients, patients, or customers.

	Total Costs 100%	GST	Net
Heat (Gas)			
Electricity (BC Hydro)			
Insurance		N/A	
Maintenance & repairs			
Mortgage interest		N/A	
Property taxes		N/A	
Rent			
Strata fees			
Water / Sewage / Garbage collection			
Other (specify)			

In the event of an audit, the onus of proof is on the taxpayer, unsupported claims may be denied. All expenses should be totalled from actual receipts that can be presented to the CRA upon request. You must keep your records for 6 years from the date your return has been assessed (not the date it was filed)

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