

# Self Employment Information Organizer

It is important to complete the following form clearly, accurately and in detail.

# TAXplan - Self Employment Information Organizer

For tax year \_\_\_\_\_

## Identification

Name	_____
Business Name	_____
Business Address	_____
Business Tel. #	_____
Business Description	_____
Percentage Ownership	_____
Home Telephone	_____
Email	_____
Business website (if applicable)	_____
Business website (if applicable)	_____

## Other Owners

### DETAILS OF OTHER OWNERS (if applicable)

Name Of Other Owner	_____
Ownership Percentage	_____
SIN	_____
Name Of Other Owner	_____
Ownership Percentage	_____
SIN	_____



## Fiscal Period

Is this your first year of business?

Yes  No

If yes, please provide start date:

Is this your final year of business?

Yes  No

If yes, please provide end date:

## Business Info

Is the income for your business derived from sales, commissions or professional fees?

Sales  Commissions  Fees

Does your business charge HST?

Yes  No

If yes to above question please provide HST #

Is your business based out of your home or principal residence?

Yes  No

## Business Income / Sales

Total income or Sales (incl. HST if applicable)

HST collected (if applicable)

Net Income or Sales



# Business Expenses

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ITEM	GROSS	HST	NET
Advertising			
Bank Fees & Charges			
Licenses			
Dues			
Memberships			
Subscriptions			
Insurance (other than automobile)			
Interest on money borrowed to finance operations			
Maintenance & Repairs (other than home or auto)			
Meals & Entertainment (total cost)			
Office Expenses			
Supplies			
Legal/Accounting or other Professional Fees			



# Business Expenses

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ITEM	GROSS	HST	NET
Property Taxes (other than home)			
Rent (other than home)			
Subcontractor Fees			
Employee Salaries or Wages (incl. employer contributions)			
Travel or Transportation (other than your automobile)			



# Capital Purchases

Did you purchase any equipment during the taxation year that will be of use to you for more than one year?  
(For example: computer, printer, office furniture, etc.)

Yes  No

DESCRIPTION	DATE PURCHASED	GROSS	HST	NET

Did you sell any equipment during the taxation year that you had previously been claiming capital cost allowance for?  
(For example: computer, printer, office furniture, etc.)

Yes  No

DESCRIPTION	SALE PRICE



# Automobile Related Expenses

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Please complete the following if you use your own automobile in the course of your business activities.  
(Please fill in all details)

Make, model & year of your vehicle	_____
Is vehicle owned, leased or financed?	_____
If owned, purchase date & price	_____
If leased, lease start date	_____
If leased, lease end date	_____
If financed, purchase date & price	_____
Total kms driven in taxation year	_____
Kms driven for business purposes	_____
If car was sold what was the sale price?	_____



# Automobile Expenses

ITEM	GROSS	HST	NET
Fuel			
Repairs & Maintenance			
Lease Payments for Taxation Year			
Auto Insurance			
License & Registration			
Interest expense on money borrowed to purchase the vehicle			
Car Washes			
Parking			





# Home Office Related Expenses

Note: When calculating the percentage of your home used for business purposes use either a square footage ratio or the number of rooms you use divided by the total number of rooms in the home. In either case, eliminate common areas such as hallways and bathrooms.

Please complete the following if you use a part of your home in the course of your business activities.

What percentage of your home do you use for business?

ITEM	GROSS	HST	NET
Heat			
Electricity			
Insurance			
Maintenance			
Mortgage Interest			
Property Taxes			
Telephone			
Internet			



# Other Noteworthy Information

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Other Noteworthy Information (please specify):

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Signature

\*I hereby acknowledge that the above information is accurate and complete.

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Date

## Disclaimer

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By submitting this form you agree to the following terms: Although every effort is made to reduce your tax payable by uncovering all available credits and deductions, TAXplan cannot be held responsible if something is missed. Your input and questions are both welcome and necessary to prepare the best possible tax return for you.

