

2023 SELF-EMPLOYED BUSINESS ACTIVITY CHECKLIST

1. General Information

Taxpayer Name	
Start Date of Business	

2. Revenue

(including GST/HST if Quick Method is used for GST/HST return filing)

Please provide us with your total sales or other income for the year: \$ _____

3. Inventory/Purchases

(including GST/HST if Quick Method is used for GST/HST return filing or not a GST/HST registrant)

- Inventory count (December 31, 2022) \$ _____
- Total purchases during 2023 \$ _____
- Inventory count (December 31, 2023) \$ _____

4. Expenses

(including GST/HST if Quick Method is used for GST/HST return filing or not a GST/HST registrant)

Please provide us with the following amounts:

- Interest \$ _____
- Other bank charges \$ _____
- Tax preparation (last year) \$ _____
- Postage/Freight \$ _____
- Wages paid \$ _____
- Telephone (cellular, long distance etc.) \$ _____
- Internet \$ _____
- Advertising expenses - meals & entertainment expenditures \$ _____
- Office (business cards, faxes, paper, envelopes, etc.) \$ _____
- Travel (airfare, hotels, transportation) \$ _____
- Capital Assets, acquisitions and dispositions over \$200 (computers, furniture, etc.)
 please list: _____ \$ _____
- Licenses, dues & subscriptions \$ _____
- Insurance \$ _____
- Supplies \$ _____
- Private Health Service Plan \$ _____
- Other (provide description) \$ _____

5. Copy of GST/HST Return if Quick Method Used

Copy of GST/HST Return Provided?

Yes No

6. Automobile Checklist

KILOMETRES – If you used more than one vehicle for business in 2023, please provide information for each vehicle.

Please note driving between work and home is considered personal use.

- Odometer reading at December 31, 2023 _____ km
- Odometer reading at December 31, 2022* _____ km
- Kilometres driven for business _____ km (total from mileage log)

* or at the date when the business started in 2023

VEHICLE SPECIFICATIONS (Please provide purchase/lease documents if purchased or leased in 2023)

- Model _____
- Year _____
- Date of Purchase _____
- Purchase price including tax _____

AUTOMOBILE EXPENSES (total paid during the year)

- Gas / Fuel \$ _____
- Repairs and Maintenance \$ _____
- Insurance \$ _____
- Lease payments \$ _____
- Loan interest (request a statement from your bank) \$ _____
- Parking (used for business only) \$ _____

7. Home Office Checklist

MEASUREMENTS

- Square footage of entire house \$ _____ sq. ft.
- Square footage of room used for office \$ _____ sq. ft.

EXPENSES

- Mortgage interest (statement from bank) \$ _____ or
- Rent \$ _____
- Property taxes paid (statement from bank or municipality) \$ _____
- House/apartment insurance \$ _____
- Repairs or maintenance to house/apartment \$ _____
- Water \$ _____
- Heat/electricity \$ _____