Link It
ACCOUNTING + FINANCIAL SERVICES

Commission Tax Return Checklist

Complete	Task	Response & Notes
	First and Last Name	
	Phone	
	Email	
	SIN	
	Date of Birth	
	Citizenship	
	Marital Status	
	INCOME	
	Employment – T4	
	All income from business	
	If assets have been purchased for use in the business, or loans incurred for business purposes, provide appropriate document	
	Did you dispose of any capital properties this year? (attach copies of sales detail and purchase documentation).	
	DEDUCTIONS	
	Office Supplies Expenses	
	Vehicle Details (Lease information or Purchase/Finance Information)	
	Vehicle Expenses (Gas, Car Washes, Maintenance, Parking, Insurance)	
	Transit Details (if not using personal vehicle and using public transit - receipts are required)	
	Car Sharing Transportation Receipts/Details	
	Cab (if required for business purposes - receipts/details)	
	Total Home Square Footage	
	Estimated Square Footage of Office Space in Home	
	Home Utility Bills (Hydro, Fortis, Telus/Shaw)	
	Maintenance Fees	
	Mortgage Insurance	
	Mortgage Interest Details (Annual Mortgage Statement)	
	Property Taxes	
	Rental Information (if you are renting a property - amount of rent per month)	
	Rental Insurance	
	Cell Phone - MUST be on a Business Plan	
	Other deductions and expenses (attach receipts)	
	Prior Year Tax Return and NOA	
	Access to My CRA My Account	

Additional requests may be made at any time.

Please provide me with CRA Access to your My CRA Personal Account.
This can be done through logging into your My CRA account.
Go to Authorize Representatives, add a Representative, Level 2 Access

Please Contact Us for our Rep ID then go to your My CRA and click on Authorize Representatives