Link It
ACCOUNTING + FINANCIAL SERVICES

## Contract Work Tax Return Checklist

| Complete | Task | Response & Notes |
|---|---|---|
| | First and Last Name | |
| | Phone | |
| | Email | |
| | SIN | |
| | Date of Birth | |
| | Citizenship | |
| | Marital Status | |
| | GST Registration information | |
| | **INCOME** | |
| | Employment – T4/T4A's | |
| | Copies of ALL contracts within Fiscal Year | |
| | All income from business | |
| | If assets have been purchased for use in the business, or loans incurred for business purposes, provide appropriate documents | |
| | 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 bills * | |
| | Professional Development (conference and seminar receipts including all travel, accommodations, and meals directly related to the conference) | |
| | Contract required travel, accommodations and meals | |
| | Other deductions and expenses (attach receipts) | |
| | Prior Year Tax Return and NOA | |
| | Access to My CRA My Account (My CRA Business Account if you have one) | |

Additional requests may be made at any time.

*CELL PHONE* CRA will most likely NOT allow this write-off unless we split each monthly detailed bill between personal and business.
Must be completed based on detailed bills and your business use MUST be higher than personal use.
You will need to provide this split on each months' bill.

Please provide me with CRA Access to your personal account.
This can be done through your My CRA account.
Go to Authorize Representatives

**Please Contact Us for our Rep ID then go to My CRA Personal / Business Profile and click on Authorize Representatives**