

## Partnership Tax Return Checklist

Complete	Task	Response &Notes
	Business Name (BC Registered Documents - Name and Date information)	
	Phone	
	Address of Registered Office	
	All CRA registrations (payroll deductions, GST)	
	PST Registration information	
	Shareholder Names (full legal names)	
	Shareholder Percentages (what shares/level/% of ownership)	
	Citizenship of each Shareholder	
	Relationship between Shareholders	
	Partnership share percentage	
	<b>INCOME</b>	
	All income from business related activities	
	Any business investment activities (active and passive)	
	If assets have been purchased for use in the business, or loans incurred for business purposes, provide appropriate documents (all invoices)	
	Did you dispose of any capital properties this year? (attach copies of sales detail and purchase documentation).	
	<b>DEDUCTIONS</b>	
	All business related expenses	
	Bank Statements	
	Credit Card Statements	
	Vehicle Purchase/Lease Agreements	
	Office Space Rental/Lease Agreement	
	Office Space Expenses (utilities, janitorial, insurance, parking, maintenance fees)	
	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	
	Home Rental Information (if you are renting a property - amount of rent per month)	
	Home Rental Insurance	
	Cell Phone - MUST be on a Business Plan	
	Other deductions and expenses (attach receipts)	
	Prior Year Partnership Tax Return and NOA	
	Access to CRA My Business Account (this will be for filing GST)	
	Access to any accounting software (Quickbooks/Zero, etc.)	
	PST login information	

Additional requests may be made at any time.