

Sole Proprietorship Tax Return Checklist

Complete	Task	Response & Notes
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Firstand Last Name
Phone
Email
SIN
Date of Birth
Citizenship
Marital Status
GSTRegistration Information
PSTRegistration information

INCOME

	Employment – T4A	
	All income from business	
	If assets have been purchased for use in the business, or loans incurred for business purposes	
	please 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 - MUST be on a Business Plan	
	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)	
	Access to any accounting software (Quickbooks/Zero, etc.)	
	PST login information	

Additional requests may be made at any time.

Please provide me with CRA Access to all of your business accounts that have been registered with CRA.
This can be done through your My CRA Business account.

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