



**SELF EMPLOYMENT PERSONAL TAX RETURN SUMMARY**

Client Name \_\_\_\_\_

Business Name \_\_\_\_\_

Business Address \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Type of Business \_\_\_\_\_

**REVENUE**

Sales (before GST) \_\_\_\_\_

GST Collected \_\_\_\_\_

**COST OF SALES - Including GST**

Opening Inventory \_\_\_\_\_

Purchases \_\_\_\_\_

Direct Wages \_\_\_\_\_

Subcontracts \_\_\_\_\_

Other Direct Costs \_\_\_\_\_

Closing Inventory \_\_\_\_\_

**EXPENSES - Including GST**

Advertising \_\_\_\_\_

Meals and Entertainment \_\_\_\_\_ x 50%

Bad Debts \_\_\_\_\_

Insurance \_\_\_\_\_

Interest and Bank Charges \_\_\_\_\_

Business taxes, licenses and memberships \_\_\_\_\_

Office Expenses \_\_\_\_\_

Office stationery and supplies \_\_\_\_\_

Professional fees (includes legal and accounting fees) \_\_\_\_\_

Management and administrative fees \_\_\_\_\_

Rent \_\_\_\_\_

Repairs and maintenance \_\_\_\_\_

Salaries (including employer contributions) \_\_\_\_\_

Property Taxes \_\_\_\_\_

Travel Moving \_\_\_\_\_

Travel Convention \_\_\_\_\_

Utilities, light heat, air \_\_\_\_\_

Utilities, telephone \_\_\_\_\_

Fuel \_\_\_\_\_

Other (provide description) \_\_\_\_\_

Delivery \_\_\_\_\_

Other (provide description) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



**BUSINESS USE OF HOME**

Complete this section if you used a home office during the year and wish to claim expenses

Square footage of office	_____	sq. ft.	
Total square footage of home	_____	sq. ft.	Expenses 100%
	_____	%	
Heat			_____
Electricity			_____
Insurance			_____
Maintenance			_____
Mortgage <u>interest</u> (request statement from bank)			_____
Property taxes			_____

*\*Note that to claim home office, this must be the place where you mainly do your work. Your home office must be exclusively used for earning income, and used on a regular and continuous basis for meeting customers or other persons in the course of performing your work.*

**SELF EMPLOYMENT AUTOMOBILE SUMMARY**

Please complete this schedule for each vehicle you are claiming expenses for from the prior year

Client Name: \_\_\_\_\_

**VEHICLE SPECIFICATIONS**

Vehicle One

Vehicle Two

Own or Lease	_____	_____
Year	_____	_____
Make	_____	_____
Model	_____	_____
Date of purchase or Lease	_____	_____
Original Purchase price - including GST	_____	_____

**BUSINESS USE CALCULATION**

Please use the following section to calculate your business use, or provide an approximate %  
Note that CRA has increased its scrutiny on business automobile expenses and has recently disallowed claims where no logbook was used to track actual usage

Odometer reading at January 1	_____ km	_____ km
Odometer reading at December 31	_____ km	_____ km
Kilometers driven for business use (per mileage log)	_____ km	_____ km
Business use portion	_____ %	_____ %

**EXPENSES**

Fuel and oil	_____	_____
Loan <u>interest</u> (request a statement from the bank if owned)	_____	_____
Insurance	_____	_____
License and registration	_____	_____
Repairs and maintenance	_____	_____
Lease payments	_____	_____
Parking	_____	_____