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Taxation year: _____

Name: _____

The information gathered in this checklist will assist with the preparation of your tax return. It is not meant to replace professional advice. For more information, please contact the office or click on the following link to be directed to CRA's website.

[CRA - Statement of Business Income](#)

Business Checklist

****Please note if you are registered for GST, amounts on this spreadsheet should not include GST.**

Operating Name of Business: _____

Business Number: _____

Date business started: _____ Date business ceased: _____

Main Product or service: _____

Registered for GST? _____ Filing frequency: _____

Detailed method or Quick method? _____

Registered for Payroll? _____ Payroll remittance frequency: _____

Registered for WCB? _____

Income: \$ _____

Costs of goods sold:

Opening Inventory: \$ _____

Purchases in the year: \$ _____

Direct wage costs: \$ _____

Subcontracts: \$ _____

Closing Inventory: \$ _____

Operating expenses:

Advertising: \$ _____

Meals & Entertainment: \$ _____

Bad debts: \$ _____

Business insurance: \$ _____

Taxes, license & memberships: \$ _____

Office expenses: \$ _____

Supplies: \$ _____

Accounting & Legal: \$ _____

Rent: \$ _____

Repairs & Maintenance: \$ _____

Salaries & wages paid: \$ _____

Property Taxes: \$ _____

Business travel: \$ _____

Utilities: \$ _____

Postage & delivery: \$ _____

Bank charges & interest: \$ _____

Business telephone: \$ _____

Cell phone: \$ _____

Equipment rental: \$ _____ Private Health Care Plan (not MSP): \$ _____
Training expenses: \$ _____
Internet charges: \$ _____
Other (specify): _____

Have you purchased any capital assets in the year?

If so - please provide details:

Description: _____	Cost: \$ _____
Description: _____	Cost: \$ _____
Description: _____	Cost: \$ _____

If you have an office in your home or drive a vehicle for business, please see our Office in the home sheet as well as our
Vehicle sheet on our website bethstuartcpa.com

Prepared by: _____

Date: _____

Please ensure that you keep all receipts to substantiate your income and expenses.

"Where everybody counts"