



Business Income & Expenses

BUSINESS NAME		
BUSINESS TYPE		
BUSINESS (HST) NUMBER (if applicable)		

INCOME	TOTAL INCOME (including HST)	
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COST OF GOODS SOLD	OPENING INVENTORY	
	MATERIAL PURCHASES	
	LABOUR / SUBCONTRACTS	
	CLOSING INVENTORY	

OPERATING COSTS	ADVERTISING / GIFTS	
	STAFF MEALS	
	CLIENT MEALS / ENTERTAINMENT	
	BAD DEBTS	
	INSURANCE	
	INTEREST / BANK FEES	
	REGISTRATION / LICENSES / FEES / DUES	
	CLASSES / CONFERENCES (business related)	
	OFFICE EXPENSES	
	SUPPLIES	
	TAX PREP FEE	
	RENT (business space out-of-home)	
	REPAIRS / MAINTENANCE	
	SALARIES / WAGES	
	BUSINESS TRAVEL (meals, hotel, flight, etc)	
	TELEPHONE / INTERNET (business % only)	
	DELIVERY / POSTAGE	
	CAPITAL EXPENSES - COMPUTERS	
	- FURNITURE	
	HEALTH PLAN PREMIUMS	
OTHER (describe)		

CONSULT PV TAX FOR ELIGIBILITY OF LARGE EXPENDITURES



Business Income & Expenses

VEHICLE INFO	YEAR / MAKE / MODEL	
	DATE PURCHASED	
	TOTAL PURCHASE PRICE	

VEHICLE EXPENSES ~ PLEASE INCLUDE FULL TOTALS FOR THE YEAR. WE WILL REDUCE THESE NUMBERS TO BUSINESS PERCENTAGE ~	BUSINESS KMS IN YEAR (CRA requires log or tracking)	
	TOTAL KMS DRIVEN IN YEAR (odometer readings)	
	FUEL	
	REPAIRS / MAINTENANCE	
	LEASE PAYMENTS	
	WASHES	
	INSURANCE	
	LICENCE / REGISTRATION	
	LOAN (interest portion only)	
	CAA / RELATED	
	EXPRESS ROUTES / TOLLS	
	PARKING	
OTHER (describe)		

HOME OFFICE ~ PLEASE INCLUDE FULL TOTALS FOR THE YEAR. WE WILL REDUCE THESE NUMBERS TO BUSINESS PERCENTAGE ~	AREA OF HOME USED FOR BUSINESS	
	TOTAL AREA OF HOME	
	UTILITIES - HEAT	
	UTILITIES - HYDRO	
	INSURANCE	
	REPAIRS / MAINTENANCE (directly related)	
	MORTGAGE *(interest portion only)*	
	RENT / PROPERTY TAXES	
	WATER HEATER / SOFTENER	
	SUPPLIES	
OTHER (describe)		

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RETAIN ALL RECEIPTS FOR 7 YEARS IN CASE OF CRA REVIEW

Disclaimer: Your tax return prepared by PV Tax based on the information provided.

Client Signature
