

Information we are waiting for:

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Questions:

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**2023 Tax Year Business Information Sheet**

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

Address: \_\_\_\_\_

\*Owner(s): \_\_\_\_\_ Ph. # \_\_\_\_\_

\*Date Business was established: \_\_\_\_\_ Product or Service: \_\_\_\_\_

\*Business Number: \_\_\_\_\_ \* HST registered? **Yes / No**

\*Total Sales/Revenue: \_\_\_\_\_

\*Do you earn income from a web site/internet?: \_\_\_\_\_

\*HST included in sales? **Yes / No** HST collected \_\_\_\_\_

\*Opening Inventory: \_\_\_\_\_ **HST Paid**

\*Purchases: \_\_\_\_\_

Sub-contract Expense: \_\_\_\_\_

\*Closing Inventory: \_\_\_\_\_

**\*Expenses:** (need totals for any of the following exp. that apply to your business)

Advertising (gifts/promo) \_\_\_\_\_

Meals & Entertainment(@ 100%) \_\_\_\_\_

Bad Debt(uncollectible customers) \_\_\_\_\_

Insurance (Business Liability) \_\_\_\_\_

Interest on business loans \_\_\_\_\_

Bus.reg.,fees,lic.,dues,mbrshps,&subscriptions \_\_\_\_\_

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

Office Stationery & Supplies \_\_\_\_\_

Professional Fees(Lawyer/Acct./Tax Prep) \_\_\_\_\_

Mngmnt./admin. fees & bank chgs. \_\_\_\_\_

Rent \_\_\_\_\_

Maint. & Repairs \_\_\_\_\_

Salaries/Wages/Benefits(incl. employer contributions) \_\_\_\_\_

Traveling Expense (trans./accom) \_\_\_\_\_

Electricity, heat & water for office space outside the home \_\_\_\_\_

Cell ph. & internet \_\_\_\_\_

Freight & Delivery \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

**\*Capital Expenditures:** (over \$500.00 for tools or over \$200.00 for anything else)

**HST Paid**

Computer, Office Equipment: \_\_\_\_\_

Any other purchases over \$200 \_\_\_\_\_

Previous personal items now used for business: \_\_\_\_\_

**\*Automobile Expenses:** (are you claiming auto exp.? Yes/No)

Type of Vehicle: \_\_\_\_\_

Odometer reading: starting \_\_\_\_\_ ending \_\_\_\_\_ difference \_\_\_\_\_

Is this the same vehicle used last year? \_\_\_\_\_

Approx. value of vehicle (if first year of business) \_\_\_\_\_

Cost if purch. in tax year (we require sales/purchase receipt) \_\_\_\_\_

Km's Driven for business: \_\_\_\_\_

Total km's driven: \_\_\_\_\_

Total Gas Purchases: \_\_\_\_\_

Interest on loan (purchase): \_\_\_\_\_

Insurance: \_\_\_\_\_

License Renewal Fee: \_\_\_\_\_

Maintenance & Repairs: \_\_\_\_\_

Electricity for EV's \_\_\_\_\_

Leasing: (Start and ending date of lease) \_\_\_\_\_

Down Payment on Lease \_\_\_\_\_

Parking: \_\_\_\_\_

Other: \_\_\_\_\_

**\*Home Office Expenses:** (Are you claiming home office exp.? Yes/No )

To qualify as home office expense, one of these two criteria must be met.

1. It is your principal place of business ( >50%) or
2. You use it to earn business income on a regular basis to meet clients

Business use sq. ft: \_\_\_\_\_ Total House sq. ft: \_\_\_\_\_ % used for business: \_\_\_\_\_

Heat: \_\_\_\_\_

Electricity: \_\_\_\_\_

Insurance: \_\_\_\_\_

Maintenance: \_\_\_\_\_

Mortgage Interest: \_\_\_\_\_

Property Tax: \_\_\_\_\_

Water: \_\_\_\_\_

Rent: \_\_\_\_\_

Internet: \_\_\_\_\_

Other: \_\_\_\_\_