



TurboTax Self-Employed Tax Prep Checklist

Use this handy checklist to organize all the information you'll need to do your self-employment income taxes. With TurboTax Self-Employed, we'll help you get back every dollar you deserve!

GENERAL INFORMATION

- ☐ Business name: _____
- ☐ Business number: _____
- ☐ Business address: _____
- ☐ Business main product or service: _____
- ☐ GST/HST number: _____
- ☐ Gross business income (including GST/HST): \$ _____
- ☐ Sales, commissions (total before GST): \$ _____
- ☐ GST collected: \$ _____
- ☐ HST collected: \$ _____
- ☐ Partnership business number (if applicable): _____
- ☐ Percentage of the partnership (if applicable): _____

COST OF GOODS SOLD

- ☐ Opening inventory of material (at Jan 1) \$ _____
- ☐ Purchase of materials \$ _____
- ☐ Closing inventory of materials (at Dec 31) \$ _____
- ☐ Direct wage costs \$ _____
- ☐ Sub-contracts \$ _____

BUSINESS EXPENSES

- ☐ Advertising expenses \$ _____
- ☐ Meals and entertainment \$ _____
- ☐ Bad debts \$ _____
- ☐ Insurance \$ _____
- ☐ Private health premiums \$ _____
- ☐ Interest and bank charges \$ _____
- ☐ Office expenses \$ _____
- ☐ Office stationery and supplies \$ _____
- ☐ Rent \$ _____
- ☐ Property taxes \$ _____
- ☐ Maintenance and repairs \$ _____
- ☐ Salaries, wages, and benefits \$ _____
- ☐ Seminars and training \$ _____
- ☐ Travel \$ _____
- ☐ Internet \$ _____
- ☐ Telephone and utilities \$ _____
- ☐ Other expenses \$ _____
- ☐ Business fees, licenses, dues and subscriptions \$ _____
- ☐ Professional fees (legal and accounting) \$ _____
- ☐ Management and administration fees \$ _____
- ☐ Delivery and freight (postage, courier) \$ _____

VEHICLE EXPENSES

- ☐ Make, model, year: _____
- ☐ Date purchased or leased: _____
- ☐ Original cost of vehicle (if leased) \$ _____
- ☐ How many kms did you drive for business purposes? _____
- ☐ How many kms did you drive in total? _____
- ☐ % of business mileage (business kms divided by total kms) _____
- ☐ Interest charges (if you are financing your vehicle) \$ _____
- ☐ Leasing cost (if you are leasing your vehicle) \$ _____
- ☐ Fuel and oil \$ _____
- ☐ Auto insurance \$ _____
- ☐ Licence and registration costs \$ _____
- ☐ Maintenance and repairs \$ _____
- ☐ Parking fees during business activity \$ _____
- ☐ Supplementary business insurance \$ _____
- ☐ Other expenses (please specify) \$ _____

BUSINESS USE-OF-HOME EXPENSES

- ☐ Heating \$ _____
- ☐ Electricity \$ _____
- ☐ Water \$ _____
- ☐ Home / rental insurance \$ _____
- ☐ Maintenance \$ _____
- ☐ Mortgage interest \$ _____
- ☐ Property taxes \$ _____
- ☐ Repairs, cleaning, landscaping and supplies \$ _____
- ☐ Strata fees \$ _____
- ☐ Other expenses \$ _____
- ☐ Square footage of home office space \$ _____
- ☐ Total square footage of home _____
- ☐ % used for business (home office divided by total) _____