**2023** Self-employed Tax Questionnaire

This questionnaire is designed to assist you in compiling the information necessary to prepare your **2023** self-employed business and rental statement tax return.

|  |  |
| --- | --- |
| Client Name: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Date of Birth: |  | S.I.N.: |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Telephone: |  | Fax: |  | Email: |  |
| Address: |  |
|  |  |
| Marital status (if changed in **2023**, indicate change and date) |  |

**Business and Self-employed Information**

|  |  |  |  |
| --- | --- | --- | --- |
| Name: |  |  Business Name (if any): |  |

|  |  |  |
| --- | --- | --- |
| Business Address:  |  |  |
| (If different from home) |  |  |

|  |  |
| --- | --- |
| Main Product or Service: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Start Date (if first year): |  |  If Partnership, your %: |  |

|  |  |  |
| --- | --- | --- |
| Registered for GST/HST? [ ]  Yes [ ] No If Yes - GST/HST No. |  |  |

|  |
| --- |
| **Business Income** |
| **Name of Payer** | **Amount paid** **(excluding GST/HST)** | **GST/HST collected** |
| Income with T4A slips (please attach all T4A slips) |  | $ | $ |
|  |  |  |
|  |  |  |
|  |  |  |
| Income without T4A slips |  | $ | $ |
|  |  |  |
|  |  |  |
|  |  |  |
| **Total** |  | **$** | **$** |
| **Business Expenses** |
| **Amount Paid** (Including GST/HST) | **GST/HST paid** | **Amount Paid** (Including GST/HST) | **GST/HST paid** |
| Advertising |  |  | Repair and maintenance |  |  |
| Gifts |  |  | Travel |  |  |
| Meals and entertainment |  |  | Internet |  |  |
| Business insurance |  | N/A | Telecommunications |  |  |
| Interest |  | N/A | Cable |  |  |
| Bank charges |  | N/A | Delivery, courier/post |  |  |
| Dues and fees |  |  | Professional development |  |  |
| Office expenses |  |  | Vendor fees |  |  |
| Supplies |  |  | Private health premiums |  | N/A |
| Accounting |  |  | Salaries and benefits |  | N/A |
| Professional fees |  |  | Other expenses (specify) |  |  |
| Management and admin |  |  |  |  |  |
| Rent |  |  |  |  |  |
| Property taxes |  | N/A |  |  |  |
| Utilities |  |  |  |  |  |
| **Automobile expenses** | **Office in home expenses**  |
| **Amount Paid** (Including GST/HST) | **GST/HST paid** | **Amount Paid** (Including GST/HST) |
| Gas and oil |  |  | Rent |  |
| Loan interest |  | N/A | Heat |  |
| Car insurance |  | N/A | Electricity |  |
| License and registration |  | N/A | Home insurance |  |
| Repair and maintenance |  |  | Repairs |  |
| Leasing |  |  | Mortgage interest |  |
| CAA |  |  | Property taxes |  |
| Parking |  |  | Condo fees |  |
| Car make & year of purchase |  | Others |  |
| Cost of vehicle (Including GST/HST) |  | Square footage of home office |  |
| KM used for business |  | Total square footage of home |  |
| Total KM driven |  |  |  |
| **Equipment purchased** |
| **Description** |  **Amount paid (Including GST/HST)**  |  **GST/HST Paid**  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Rental Income**
If you had rental income from any sources, please list the rental income and expenses as follows:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Property 1** | **Property 2** | **Property 3** |
| **Full Address** |  |  |  |
| **# of units** |  |  |  |
| **Rental income (gross)** | $ | $ | $ |
|  |
| **Expenses:** |  |  |  |
|  Advertising | $ | $ | $ |
|  Insurance |  |  |  |
|  Mortgage interest |  |  |  |
|  Office expenses |  |  |  |
|  Legal, accounting, other professional fees |  |  |  |
|  Management and administration fees |  |  |  |
|  Maintenance and repairs |  |  |  |
|  Property taxes |  |  |  |
|  Utilities (heat, electricity, water) |  |  |  |
|  Travel |  |  |  |
|  Condo fees |  |  |  |
|  Other expenses (specify) |  |  |  |
|  |
| During **2023**, did you carry out any major repairs or acquire any furnishings?Specify the nature, date, and amount for each:  |  |  |  |
|  |
| Your % of ownership |  |  |  |
| Your spouse’s % of ownership including First name, Last name, and SIN # |  |  |  |
| Co-owner’s % of ownership includingFirst name, Last name, and SIN # |  |  |  |
| Co-owner’s % of ownership includingFirst name, Last name, and SIN # |  |  |  |