**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 including  First name, Last name, and SIN # |  |  |  |
| Co-owner’s % of ownership including  First name, Last name, and SIN # |  |  |  |