



Aries Accounting

#202 - 879 Anders Road
West Kelowna, BC V1Z 1K2
Phone: 250-454-9483

Office Use Only	
Client Number	
Date Received	

Self-Employment Personal Tax Checklist 2018

Name: _____ SIN: _____

Business Name: _____ Start date of business: (If new this year) _____

Business Address: _____

City: _____ Postal Code: _____

Phone Number: _____ Email: _____

Main Product or Service: _____ Website: _____

Sole Proprietorship Partnership

Partners Information

First Name	Last Name	SIN	Partnership	
_____	_____	_____	_____	_____%
_____	_____	_____	_____	_____%
_____	_____	_____	_____	_____%

GST Registered? YES NO

Business Number: _____ RT _____

Have you previously filed a GST return for the 2018 year? YES NO

Sales

Sales \$ _____ Does this figure include GST? YES NO

Web Based Income? _____ %

Assets (Over \$200 – ex. New Computer, Auto, etc. – Please provide original receipts or invoices)

Item Purchased	Date Purchased (yyyy/mm/dd)	Value
		\$
		\$
		\$
		\$

Revenue and Expenses

- 2018 Income Statement or working papers (Excel or Accounting Software Backups)
- 2018 Sales Invoices
- Other

Home Office

Square footage of entire house _____ sq. ft.

Square footage of room used for office (including areas used for business storage) _____ sq. ft.

Home Office Expenses (Please provide original receipts or invoices)

- Heat _____ \$
- Electricity _____ \$
- House/Apartment Insurance _____ \$
- Repairs & Maintenance _____ \$
- Mortgage Interest _____ \$
- Property Tax _____ \$
- Rent _____ \$
- Internet _____ \$
- Water and Sewer _____ \$
- Other (Please Specify): _____ \$

Vehicle Checklist (Auto log is required. If a new vehicle was leased, purchased or sold in the year, please provide all documents)

Kilometers driven in 2018 _____ Personal Use Percentage _____ %
 Vehicle Make _____ Vehicle Year _____

- Vehicle Maintenance and Repairs _____ \$
- Vehicle Fuel _____ \$
- Vehicle Loan Interest (please provide loan agreement) _____ \$
- Vehicle Lease Payments (please provide lease agreement) _____ \$
- Vehicle Insurance _____ \$

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Additional Information (**May be requested*)

- 2018 Bank Statements _____
- 2018 Business Credit Card Statements _____
- Other _____