

Self-Employment / Small Business Addendum

This addendum is for clients who are self-employed or operate a small business.

Business Information

Business Address: _____ Postal Code: _____

Sole Proprietor Partnership

Main Product or Service: _____ Business Number (if applicable): _____

GST Registered? Yes No PST Registered? Yes No

If Profit & Loss is provided (e.g., Excel sheets): Do these totals include GST/PST? Yes No

Is N&L filing your GST/PST? Yes No

Partner Information (if applicable)

Last Name: _____ First Name: _____

S.I.N: _____ D.O.B (YYYY/MM/DD): _____

Address: _____ Postal Code: _____

Expense Checklist

Home Office (if applicable): Sq ft used for office: _____ Total house Sq ft: _____

Business Use of Home Expenses: Public services (electricity, water) Heat Insurance Maintenance

Mortgage interest Property taxes Rent

Business Expenses: Advertising Bad debts Business start-up costs Business tax, fees, licenses & dues

Capital cost allowance Delivery, freight & express Fuel costs (except for motor vehicles) Insurance

Interest & bank charges Legal, accounting & professional fees Maintenance & repairs

Management & administration fees Meals & entertainment Office expenses Property taxes Rent

Salaries, wages & benefits Supplies Telephone & utilities Travel Cost of goods sold (building materials,

food for catering, etc.) Other: _____

Inventory (if applicable): Year-end inventory value: \$ _____

Motor Vehicle Expenses: KM driven for business: _____ Total KM driven in tax year: _____

Make: _____ Model: _____ Year: _____

Fuel Insurance Maintenance Registration Interest Lease (if applicable)

Note: A logbook is required to substantiate motor vehicle expenses in case of audit.

Capital Assets (CCA)

| Asset Description | Date Acquired | Cost | Date Disposed If applicable | Cost |
|--------------------------|----------------------|-------------|--|-------------|
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Acknowledgment: By signing below, I confirm that all information provided is true and accurate. I understand that Numbers & Letters Business Solutions Ltd prepares my return, but the CRA makes the final determination on assessments.

Client Signature:

Date (YYYY/MM/DD)