



# 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 2017

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 2017 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**

- 2017 Income Statement or working papers (Excel or Accounting Software Backups)
- 2017 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 2017 \_\_\_\_\_ 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*)

- 2017 Bank Statements
- 2017 Business Credit Card Statements
- Other