



Date: ____/____/____
DD/MM/YYYY

Address: _____

Name: _____

It will soon be time to prepare your ____ tax return. Providing complete and accurate information will allow us to prepare your tax return timely and efficiently. With this in mind, we have attached a checklist and questionnaire to assist you gathering the required items.

YOUR STATEMENT OF EMPLOYMENT EXPENSES

- Provide a T2200 Declaration of Conditions of Employment, signed by both the employer and employee, available at:
<https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t2200.html>
- Provide a GST370 Employee and Partner GST/HST Rebate Application, signed by the both the employer and employee, available at:
<https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/gst370.html>
- Enter applicable amounts below and note any questions.

Employer Name: _____

Employer GST/HST registration #: _____ RT _____

\$_____._____ Accounting and legal fees (commission-paid employees only)

_____._____ Advertising and Promotion (business cards, samples, flyers, awards, media)

_____ Motor Vehicle - Make

_____ Motor Vehicle - Model

_____ YYYY Motor Vehicle - Year

____/____/____
DD/MM/YYYY Motor Vehicle - Date acquired (provide purchase agreement)

_____ Km Motor Vehicle - Total Km driven in tax year

_____ Km Motor Vehicle - Business Use kilometres
(For each business trip, keep a log listing the following: date, destination, purpose, number of kilometres.)

_____ Km Motor Vehicle - Personal Use kilometres

_____ Motor Vehicle - Employer reimbursements for personal vehicle use

_____ Motor Vehicle - Fuel



_____.	Motor Vehicle - Maintenance & repairs, (oil changes, car washes, etc.)
_____.	Motor Vehicle - Insurance / Roadside Assistance
_____.	Motor Vehicle - License & Registration
_____.	Motor Vehicle - Interest on vehicle loan (provide loan agreement)
_____.	Motor Vehicle - Leasing costs (provide lease agreement)
_____.	Entertainment expenses (commission-paid employees only) (Excluding golf green fees, sporting events, concerts, etc)
_____.	Travelling expenses
_____.	Food, beverages & meals (Enter full amount - 100%) (Document client name and business reason on receipt)
_____.	Lodging, hotel accommodations
_____.	Transportation (airline, bus, train, taxi)
_____.	Parking & tolls (407), excluding parking/speeding tickets/fines
_____.	Supplies - office & computer (must be consumed within year)
_____.	Other expenses, specify
_____.	Other expenses, specify
_____.	Other expenses, specify
_____.	Long distance phone charges / cell phone airtime (Data plans excluded unless documented on T2200)
_____.	Salaries of a substitute or an assistant
_____.	Office rent
_____.	Licenses, dues, memberships & subscriptions (commission-paid employees only)
_____.	Bonding premiums (commission-paid employees only)
_____.	Equipment leasing (commission-paid employees only)
_____.	Training costs, professional development (commission-paid employees only)
_____.	Area of home used for employment (sq. ft. or # rooms)



_____	Total area of home (sq. ft. or # rooms)
_____._____	Electricity, (Hydro & water-heater rental)
_____._____	Heat (Enbridge gas, propane, wood, etc.)
_____._____	City Water utility
_____._____	Maintenance (to maintain soundness of dwelling, not home improvement)
_____._____	Insurance (commission-paid employees only)
_____._____	Property taxes (commission-paid employees only)
_____._____	Rent
_____._____	Other, specify (incl. alarm monitoring)
_____._____	Tradesperson's OR Apprentice mechanic tools expenses (list each tool or set of tools below)

_____._____	Expenses of Employed artists - Musical instrument expenses (maintenance costs)
_____._____	Expenses of Employed artists - Musical instrument expenses (rental fees)
_____._____	Expenses of Employed artists - Musical instrument expenses (insurance costs)

Signature: _____

Date: _____ DD/MM/YYYY

Please return completed form to:

Debbie Sitzer Professional Corporation, 9 - 250 Bayview Drive, Barrie, ON L4N 4Y8

Or send securely through our encrypted file transfer service, [e-Courier](#).

9-250 Bayview Drive, Barrie, ON L4N 4Y8
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debbie@debbiesitzer.com

Debbie Sitzler Professional Corporation

Chartered Professional Accountant

Chartered Accountant

