

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 - Interest on vehicle loan (provide loan agreement)
See Limits for CCA/Depreciation <https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/sole-proprietorships-partnerships/report-business-income-expenses/claiming-capital-cost-allowance/calculate-deduction-capital-cost-allowance.html>
- _____ . _____ Motor Vehicle - Leasing costs (provide lease agreement)
See Limits <https://www.canada.ca/en/department-finance/news/2024/12/government-announces-the-2025-automobile-deduction-limits-and-expense-benefit-rates-for-businesses.html>
- _____ . _____ 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
(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
_____.	_____	Internet
_____.	_____	Other, specify (incl. alarm monitoring)
_____.	_____	Tradesperson's OR Apprentice mechanic tools expenses (list each tool or set of tools below) See Limits https://www.canada.ca/en/revenue-agency/services/tax/individuals/topics/about-your-tax-return/tax-return/completing-a-tax-return/deductions-credits-expenses/line-22900-other-employment-expenses/employed-tradespersons-including-apprentice-mechanics.html
_____.	_____	_____
_____.	_____	_____
_____.	_____	_____
_____.	_____	_____
_____.	_____	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](#).