



SWEENEY BRIDE

STRATEGIC WEALTH ADVISORY

2025 TAX ORGANIZER FOR THE SELF-EMPLOYED & CONTRACTORS

IF YOU RUN MULTIPLE BUSINESSES, PLEASE USE A SEPARATE ORGANIZER FOR EACH BUSINESS, AS THEY MUST BE REPORTED ON THE TAX RETURN SEPARATELY. PLEASE NOTE WE ARE UNABLE TO ASSIST WITH FILING YOUR GST RETURN. DO NOT USE THIS ORGANIZER FOR RENTAL PROPERTY INCOME.

YOUR NAME	
BUSINESS NAME <small>IF DIFFERENT</small>	
BUSINESS ADDRESS <small>IF DIFFERENT</small>	
INDUSTRY <small>i.e. WEB DESIGN</small>	
FIRST YEAR / LAST YEAR <small>(F/L)</small>	

INCOME	
GROSS SALES IN CAD\$ <small>INCL. GST</small>	
GROSS SALES IN NON-CAD\$ <small>i.e. USD/€</small>	
ARE T4A/1042S/T5108* FEES IN THIS TOTAL? <small>Y/N</small>	
GST COLLECTED	
QUICK METHOD OR INPUT TAX CREDITS? ** <small>Q / ITC</small>	
GST REMITTED <small>NEEDED IF EXPENSES INCLUDE TAX</small>	
DO YOUR EXPENSES INCL. TAX? <small>Y/N</small>	

* PLEASE PROVIDE THESE SLIPS

**QUICK METHOD FILERS SHOULD PROVIDE EXPENSE TOTALS AFTER TAX

BUSINESS EXPENSES	
ADVERTISING	
MEALS AND ENTERTAINMENT <small>FULL AMOUNT</small>	
BAD DEBTS	
BUSINESS INSURANCE* <small>NOT INCL. DISABILITY INSURANCE</small>	
INTEREST ON BUSINESS LOANS	
BANK CHARGES <small>NOT INCL. LOAN INTEREST</small>	
LICENSES, DUES, MEMBERSHIPS	
SUPPLIES** <small>CONSUMABLES i.e. STATIONERY</small>	
OFFICE EXPENSES* <small>OPERATING i.e. CLEANER / SECURITY</small>	
LEGAL & ACCOUNTING FEES <small>NOT INCL. SB FEES</small>	
MANAGEMENT / ADMINISTRATION FEES	
WORKSPACE RENT*	
MAINTENANCE/REPAIRS ON BUSINESS ASSETS*	
WORKSPACE PROPERTY TAXES*	
WORKSPACE UTILITIES* <small>INCLUDING LANDLINE</small>	

* NOT HOME OFFICE

** DO NOT INCLUDE EQUIPMENT, TOOLS, HARDWARE

COST OF GOODS SOLD (COGS)	
RESALE/WHOLESALE ONLY	
INVENTORY - OPENING	
INVENTORY PURCHASES IN THE YEAR*	
INVENTORY - CLOSING	
SUBCONTRACTS <small>RESALE/WHOLESALE ONLY</small>	
OTHER COGS <small>i.e. PRODUCTION/ WAREHOUSE WAGES</small>	

* DO NOT INCLUDE TOOLS, HARDWARE, NON-PRODUCTION SUPPLIES, OR ANY AMOUNTS ALSO TOTALED BELOW

HUMAN RESOURCE EXPENSES	
SUBCONTRACTS <small>SERVICE WAGES</small>	
WCB PREMIUMS	
OTHER EMPLOYEE BENEFITS	
OWNER BENEFITS	
TRAINING/ EDUCATION	

OTHER BUSINESS EXPENSES	
CELL PHONE & DATA PLAN EXPENSE**	
CELL PHONE BUSINESS USAGE %	
FUEL COSTS <small>i.e. PROPANE, NOT VEHICLE</small>	
COURIER/FREIGHT EXPENSES	
SUBSCRIPTIONS <small>INCL. WEB HOSTING AND APPS</small>	
OTHER _____	
OTHER _____	
OTHER _____	

**NEW PHONES SHOULD BE ADDED IN PURCHASES SECTION BELOW



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TRAVEL EXPENSES*	
BUSINESS MOVING COSTS	
FARES <small>FLIGHTS, FERRIES ETC.</small>	
KMS <small>MILEAGE ONLY FOR OCCASIONAL VEHICLE USE</small>	
ACCOMMODATION	
TRAVEL MEALS AND ENTERTAINMENT**	
TRAVEL PARKING	
TRAVEL INSURANCE	
CONVENTION FEES	

*IF YOU COMBINED PERSONAL & BUSINESS TRAVEL ADD % BESIDE THE EXPENSE
 **INCL. PERSONAL MEALS AND BUSINESS MEALS FOR WORK PORTION OF TRAVEL

PURCHASES	ITEM NEW / USED (N/U)	AMOUNT / DATE
SOFTWARE <small>NOT FOR EQUIPMENT SYSTEM</small>		
COMMUNICATIONS <small>PHOTOCOPY/FAX/PHONE EQUIP.</small>		
ELECTRONICS <small>COMPUTER HARDWARE</small>		
TOOLS* <small><\$500/ITEM INCL. UTENSILS CHINA LINENS</small>		
TOOLS <small>>\$500/ITEM INCL. UTENSILS CHINA LINENS</small>		
FURNITURE/ FIXTURES / APPLIANCES/ EQUIPMENT		
MACHINERY <small>MANUFACTURING/ PROCESSING GOODS</small>		
OTHER _____		
OTHER _____		
<small>IF YOU ARE A NEW SB TAX CLIENT, WE NEED THE T2125 WORKSHEETS FROM YOUR LAST T1 RETURN TO CAPTURE CCA ADDITIONS AND UCC AMOUNTS</small>		

* INDICATE IF YOUR TOOLS <\$500 INCL. DIES, JIGS, PATTERNS, MOULDS, LASTS,
 CUTTING/ SHAPING MACHINE PARTS

VEHICLE EXPENSES*	#1	#2
<small>INCLUDE TOTAL EXPENSE WE WILL PRORATE TO USAGE</small>		
YEAR/ MAKE/ MODEL OF VEHICLE		
BUSINESS KM DRIVEN IN THE YEAR		
TOTAL KM DRIVEN IN THE YEAR		
FUEL <small>GAS, PROPANE, OIL, ELECTRICITY</small>		
LOAN INTEREST <small>INTEREST ONLY</small>		
INSURANCE		
LICENCE REGISTRATION FEES		
REPAIRS & MAINTENANCE		
VEHICLE LEASE PAYMENTS		
LEASE DETAILS <small>DATE STARTED/ENDING</small>		
BUSINESS PARKING/TOLLS		
REIMBURSEMENT/REBATES		
STORAGE COSTS		

*INCL. BOAT, TRAILER, RV

NEW VEHICLE CCA DETAILS*	
<small>FILL IN DETAILS OR PROVIDE THE PURCHASE AGREEMENT</small>	
DO YOU WANT TO ADD A VEHICLE TO CCA Y/N	
PURCHASE DATE	
NEW OR USED N/U	
PURCHASE COST BEFORE GST/PST	
GST/PST	
HYBRID ELECTRIC VEHICLE Y/N	
DID YOU SELL PAST WORK VEHICLE Y - PROCEEDS AMOUNT/ N	
LIKELY TO SELL IN 2-5 YEARS Y/N	

*COMPLETE THIS IF YOU WANT TO CLAIM YOUR VEHICLE FOR CAPITAL COST
 ALLOWANCE (IT DOES NOT NEED TO BE NEW IN THIS YEAR).



