

CLIENT - SOLE PROPRIETOR Business Information Sheet

Business name: _____

Address: _____

Type of business: _____

Date business started: _____

Is the business a partnership? **YES** **NO** If yes, your % _____

Is the business registered for GST? **YES** **NO**

If YES:

Please provide GST number: _____

Registration date (or copy from CRA) _____

Are we filing the GST return? **YES** **NO**

If you are registered for GST, please ensure that you have AUTHORIZED HBM in "My Account" with CRA.

How many Internet webpages and websites does your business earn income from?
(Enter 0, if none) _____

Provide the main webpage or site address(es): _____

Percentage of your gross income generated from the webpages and websites:
(If no gross income was generated from the internet - enter 0) _____

Any additional information concerning your business?

Do the following income and expenses include GST?

YES

NO

Total for the year

Business Income

Before GST

GST only

\$ _____

\$ _____

Cost of goods sold

Total for the year

Purchases for resale during the year

\$ _____

Year end inventory value at cost (if any)

\$ _____

Year starting inventory value at cost (if any)

\$ _____

Business Expenses

Total for the year

Advertising

\$ _____

Meals & entertainment

\$ _____

Business insurance (liability, E&O-no auto)

\$ _____

Interest and bank fees

\$ _____

Business tax, licences or fees

\$ _____

Business dues, memberships & subscriptions

\$ _____

Office supplies and expenses

\$ _____

Supplies and materials

\$ _____

Legal and accounting fees

\$ _____

Administration & management fees

\$ _____

Rent (not home office)

\$ _____

Maintenance & repairs (equipment - no auto)

\$ _____

Salaries, wages & benefits

\$ _____

Property taxes (not home)

\$ _____

Travel expenses:

 Accommodations/lodging

\$ _____

 Transportation

\$ _____

 Meals

\$ _____

Cell phone (business portion only)

\$ _____

Courier, delivery, freight and postage

\$ _____

Workers compensation premiums (WCB)

\$ _____

Private health plan (Blue Cross, etc)

\$ _____

Training and courses

\$ _____

Home Office Expenses:

if you are using a portion of your home for business purposes,
you can include prorated home expenses

Total square feet of home: _____
Square feet of office/business use: _____

Expenses

Total for the year

Before GST

GST only

Heat	\$ _____	_____
Electricity	\$ _____	_____
Water and sewer	\$ _____	_____
Maintenance and repairs	\$ _____	_____
Mortgage interest (no principal portion)	\$ _____	_____
Insurance (house or tenant)	\$ _____	_____
Condo/strata or admin fees	\$ _____	_____
Rent (if you don't own your home)	\$ _____	_____
Property taxes	\$ _____	_____
Other fees (describe):	\$ _____	_____
	\$ _____	_____

Automobile Expenses:

Year/make/model of vehicle used for business _____
Year purchased: _____
Purchase price: \$ _____
Current value: \$ _____
Kms driven for business use during the year _____
Total kms driven during the year _____

Expenses

Total for the year

Fuel	\$ _____	_____
Maintenance and repairs	\$ _____	_____
Insurance	\$ _____	_____
Licensing/registration	\$ _____	_____
Loan interest (no principal)	\$ _____	_____
Lease payments	\$ _____	_____
Parking	\$ _____	_____
Autoclub (AMA, etc)	\$ _____	_____
Other fees (describe):	\$ _____	_____
	\$ _____	_____

Major business purchases:

items over \$500 (net of GST) and with a life expectancy exceeding 1 year

Description of item purchased

Purchase price

Before GST

GST only

\$ _____

\$ _____

\$ _____

\$ _____

\$ _____

\$ _____
