



SELF-EMPLOYED CHECKLIST

Sole Proprietors, Gig & Small Business (T2125)

Check off everything that applies, gather those documents, and send them to us.

Once your sales pass \$30,000 in any 12 months you must register for GST/HST – tell us if you're close.

A ABOUT YOU & THE BUSINESS

Social Insurance Number (SIN)
Full legal name, date of birth, address & postal code
Business name, type of work / industry, start date
Marital status; spouse name, SIN, DOB & net income
Direct deposit: void cheque OR account / transit / institution number
GST/HST & Business Number (if registered)

B BUSINESS INCOME

Income records: invoices, sales, platform / app payout summaries
T4A – fees or commissions for services
T5018 – construction subcontractor payments (if applicable)
T4 – employment income (if also employed)
Other income slips (T5, T3)

C EXPENSES & DEDUCTIONS (T2125)

Expense receipts (supplies, materials, software, advertising, phone/internet)
Vehicle log + expenses (fuel, insurance, repairs, lease)
Home-office expenses (% of rent/mortgage interest, utilities, property tax)
Cost of goods sold / inventory (opening & closing)
Capital asset purchases (equipment, vehicles) for CCA
Business insurance, professional & bank/merchant fees
Subcontractors or salaries paid
GST/HST collected & paid records
Personal: RRSP / FHSA / TFSA, medical, donations, childcare

D SIGN & RETURN – we send these to you

Self-Employed Tax Interview Form – completed & signed
Privacy Policy – signed
Authorization Form (AUT-01) – signed, lets us file for you