

# SELF-EMPLOYED QUESTIONNAIRE



PROFICIENCY  
TAX

## Identification

Tax year: \_\_\_\_\_

NAME: \_\_\_\_\_

Company name (if registered): \_\_\_\_\_

Business type:

Sole owner

Partnership

If Partnership, your % of profits: \_\_\_\_\_

Partnerships must include all income and expenses of the partnership.

**If this is the first time that you are declaring self-employment with us, it is strongly recommended that you make an appointment with the accountant. It is also recommended to do this in the following years.**

## Tax information - must be completed

**Please check the situation that applies to you. You must follow the instructions for your situation.**

If you have sales outside Quebec but in Canada, you must indicate them separately by province

If you have sales outside of Canada, you must report them separately.

If you have expenses outside of Quebec or outside Canada, you must indicate them separately and by province or country

**You are not registered for taxes (you do not charge clients taxes)**

Enter sales before taxes

**\* If your gross sales are greater than \$ 30,000, you must register for the GST / QST.**

### If you are registered for taxes

#### If you are using the detailed method (default)

**And you want us to prepare your tax report (provide the FPZ-500)**

Enter sales with all taxes included

Enter expenses all taxes included

If you have non-taxable expenses, use a separate line and indicate it.

**And that you prepare your tax report yourself**

Enter sales before taxes

Enter expenses before taxes

#### If you are using the quick method (rare cases)

**And you want us to prepare your tax report (provide the FPZ-500)**

Enter sales with all taxes included

Enter expenses all taxes included

**And that you prepare your tax report yourself**

Enter sales before taxes as well as non-remitted taxes

Enter expenses all taxes included

## INCOME

SOURCES OF INCOME SHOWN IN BOX 28 of a T4A \_\_\_\_\_ \$

SOURCES OF INCOME SHOWN IN BOX 48 of a T4A \_\_\_\_\_ \$

SOURCES OF INCOME SHOWN IN BOX 20 of a T4A \_\_\_\_\_ \$

SOURCE OF INCOME THAT DOES NOT APPEAR ON ANY TAX SHEET \_\_\_\_\_ \$

Work in progress (work started but not yet invoiced is taxable) \_\_\_\_\_ \$

**TOTAL** \$ - \$

### COST OF PRODUCTS SOLD (if product sale)

Purchases of goods intended for resale (also enter inventory) \_\_\_\_\_ \$

Inventory (stocks) at the end of the period \_\_\_\_\_ \$

### DIRECT EXPENSES

Advertising and promotion \_\_\_\_\_ \$ \_\_\_\_\_ %

Meal and entertainment expenses (if with client or supplier) \_\_\_\_\_ \$ \_\_\_\_\_ %

Professional insurance (not vehicle here) \_\_\_\_\_ \$ \_\_\_\_\_ %

Interest and bank charges (for business use) \_\_\_\_\_ \$ \_\_\_\_\_ %

Registration at the Registrar of Companies (\$ 34) \_\_\_\_\_ \$ \_\_\_\_\_ %

Supplies \_\_\_\_\_ \$ \_\_\_\_\_ %

Legal and professional fees \_\_\_\_\_ \$ \_\_\_\_\_ %

Professional contributions and permits \_\_\_\_\_ \$ \_\_\_\_\_ %

Accounting fees (we will automatically add our fees)?? \_\_\_\_\_ \$ \_\_\_\_\_ %

PROFICIENCY TAX



Management and administration costs	_____	\$ _____ %
Rental fees (commercial rent only, see home section below)	_____	\$ _____ %
Salary paid	_____	\$ _____ %
Subcontractors	_____	\$ _____ %
Did some subcontractors receive more than \$ 500 (yes / no)?	_____	(answer yes or no)
Travelling expenses	_____	\$ _____ %
Cell phone	_____	\$ _____ %
Small tools (under \$ 200)	_____	\$ _____ %
Internet (specify% for business)	_____	\$ _____ %
Other: (specify) :	_____	
Training or convention	_____	\$ _____ %

**VEHICLE COSTS**

**Put total amounts for the year even if personal**

Percentage of vehicle use for business:  % ex. : 5,000 km / 20,000 km or 25%

Vehicle Make: \_\_\_\_\_

**If rented:**

If it is a leased vehicle, provide Manufacturer's Suggested Retail Price:

\_\_\_\_\_ \$

You must also provide the start and end date of the contract:

\_\_\_\_\_ \$

Rental fee (annual total)

\_\_\_\_\_ \$

**If you purchased the vehicle:**

Purchase price (reporting year only):

\_\_\_\_\_ \$

If acquired before and never depreciated before, provide the replacement market value

\_\_\_\_\_ \$

Auto loan interest

\_\_\_\_\_ \$

**Other expenses**

Fuel costs \_\_\_\_\_ \$

Insurance \_\_\_\_\_ \$

Vehicle maintenance \_\_\_\_\_ \$

Plates \_\_\_\_\_ \$

Driver's license \_\_\_\_\_ \$

Short term rental (100%) \_\_\_\_\_ \$ 100%

Parking fees (only those for business) \_\_\_\_\_ \$ 100%

**HOME OFFICE**

PORTION OF USE FOR BUSINESS  %

ex.: 1 pièce/4,5 or 22%

IF not self-employed throughout the year, provide figures only for the period concerned.

\* Please provide the total amounts for the entire apartment even if shared with roommates.

100% des dépenses ici

Heating and electricity \_\_\_\_\_ \$

Home insurance \_\_\_\_\_ \$

**If owner**

Mortgage interest (the capital portion is NOT deductible) \_\_\_\_\_ \$

Municipal taxes \_\_\_\_\_ \$

School taxes \_\_\_\_\_ \$

Condo fees \_\_\_\_\_ \$

**If tenant**

Rent \_\_\_\_\_ \$

Others (specify) - please do not put internet or telephone in this section:

\_\_\_\_\_ \$

**FIXED ASSETS (ONLY IF NEVER AMORTIZED BEFORE)**

Usually goods lasting more than one year and over \$ 200. If less than \$ 200, please include as a supply.

If purchased during the reporting year, provide the purchase price.

If acquired before and never depreciated, provide the replacement market value.



	Purchase Date	Value / Price
<i>Category # 8</i>	<u>MANDATORY</u>	<u>See instruction % (if less than 100%)</u>
Desk, chairs, furniture	_____	_____ \$ _____ %
Equipment	_____	_____ \$ _____ %
<i>Category # 12</i>		
Software	_____	_____ \$ _____ %
Small tools	_____	_____ \$ _____ %
<i>Category # 50 (EXCEPT if purchased between 27-01-2009 and Feb 2011)</i>		
Computers and other IT equipmen	_____	_____ \$ _____ %
Others (specify):	_____	_____ \$ _____ %
	_____	_____ \$ _____ %

**Have you disposed of fixed assets? If you have sold or thrown away property, you have disposed of it. If so, please provide us with the details of these arrangements.**