



SELF-EMPLOYED TAX DOCUMENT CHECKLIST

✓ INCOME RECORDS

- Invoices issued
- Payment receipts
- Bank deposit summaries
- Platform earnings (Uber, Etsy, Shopify, etc.)

✓ EXPENSE RECORDS

- Home office expenses
- Supplies & materials
- Software subscriptions
- Advertising & marketing
- Vehicle mileage log
- Phone & internet usage
- Professional fees

✓ TAX FORMS

- T2125 – Statement of Business Activities
- GST/HST return (if registered)
- T4A slips (if issued)

✓ SUPPORTING DOCUMENTS

- Bank statements
- Receipts
- Equipment purchase invoices

✓ YEAR-END TASKS

- Accounts receivable summary
- Accounts payable summary
- Updated bookkeeping