

Truck Owner-Operator Tax Filing Checklist



Name (Mr./Ms.)		Cell		
Corporation Name		HST Number		
E-mail ID		Home Address		
SIN	Date of Birth _(YY/MM/DD)			
Are you a Canadian Citizen <input type="radio"/> YES <input type="radio"/> NO				
Do you own/hold foreign property with value more than \$100,000 CAD <input type="radio"/> YES <input type="radio"/> NO		Have you setup Direct Deposit for Tax Refund? If no, attach a void cheque to setup one. <input type="radio"/> YES <input type="radio"/> NO		
Did you sell your home in this tax year <input type="radio"/> YES <input type="radio"/> NO				
Do you qualify for Disability Tax Credit <input type="radio"/> YES <input type="radio"/> NO				
RRSP Contribution		Medical & Dental Expenses		
Donation/Political Contribution		Student Loan Interest		
Property Tax/Rent Receipts		Rental Income		

Family Profile

Marital Status <input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Common-law <input type="radio"/> Separated <input type="radio"/> Divorced <input type="radio"/> Widowed				
Any change in Marital Status <input type="radio"/> YES <input type="radio"/> NO			Child Care Expenses	
Spouse / Children Name	Date of Birth	SIN	Disability (Yes/No)	Relationship (Husband/Wife/Son/Daughter)

Business Documents

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| <input type="radio"/> Bank Statements (Business Account) | <input type="radio"/> Truck Parking Bill |
| <input type="radio"/> Credit Card Statements (Used for Business) | <input type="radio"/> Phone & Internet Bill |
| <input type="radio"/> Pay Statements from Carrier | <input type="radio"/> WSIB Statements |
| <input type="radio"/> Fuel Receipts and Fuel Statements | <input type="radio"/> Truck or Trailer Bill of Sale (Purchase) |
| <input type="radio"/> Truck / Trailer Repair Bills | <input type="radio"/> Lease / Loan Documents |
| <input type="radio"/> Toll Slips and Toll Card Statements | <input type="radio"/> Insurance Expenses |
| <input type="radio"/> Plate & Permit Fee Receipts | <input type="radio"/> Other Expense Bills & Receipts |