ARTISTS AND MUSICIAN'S
TAX ORGANIZER

This is a guide intended to assist you in preparing for income tax filing.

It does not necessarily include everything that may be applicable in your specific situation.

We need a copy of your last filed income tax return (if we did not prepare it) and a recent notice of assessment or reassessment.

ZOE KLEIN & COMPANY
ACCOUNTING SERVICES

1240 BAY STREET,
SUITE 401,
TORONTO, ON M5R 2A7
TEL 416.323.3709
FAX 416.323.3406
EMAIL OFFICE@ZOEKLEIN.CA
WWW.ZOEKLEIN.CA

PERSONAL INFORMATION:

Name: SIN #

Address:

Email:

INCOME

Employment income reported on T4 slips	Freelance income reported on T4A slips
Per diems (if claiming related travel expenses below)	Freelance income not reported on T4A slips
Royalties	Product sales (CDs, DVDs, etc.)

GST/HST REGISTRANTS

Does the above income include GST/HST collected? Yes ☐ No ☐ - does not include GST/HST

GST/HST collected during the year	
Residents of BC or Ontario: how much GST did you collect before July 1	
and how much HST did you collect after July 1?	

What GST/HST calculation method do you use?

- ☐ Regular or Simplified Method
- ☐ Quick Method
- ☐ I Don't Know

COST OF GOODS SOLD

Indicate product inventory on Dec. 31	
(List each product separately and record cost value not the retail price)	
Costs incurred during the year to produce new inventory	
Manufacturing costs	
Wage and subcontract costs	
Other costs	

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EMPLOYMENT INSURANCE FOR SELF-EMPLOYED TAXPAYERS

Have you entered into an agreement with the Canada Employment Insurance Commission (through Service Canada) to participate in the new "Employment Insurance (EI) Measure for Self-Employed People"? If yes, please indicate the date of registration. .....

EXPENSES

We don't need to see them, but it is important to have receipts or statements to document all expenses. Credit card or bank statements are generally not considered to be adequate documentation. Please indicate if expenses Yes ☐ includes or No ☐ exclude GST/HST:

AUTO EXPENSES (SEE DETAIL SCHEDULE)	Yes ☐ No ☐
BAD DEBTS	Yes ☐ No ☐
BANK CHARGES - FOR BUSINESS BANK ACCOUNTS ONLY	Yes ☐ No ☐
BUSINESS TAX, FEES, LICENSES, MEMBERSHIP DUES	Yes ☐ No ☐
CELL PHONE CHARGES (AIRTIME) - BUSINESS PORTION ONLY	Yes ☐ No ☐
COMMISSIONS (AGENTS ETC)	Yes ☐ No ☐
WARDROBE / COSTUMES / CLOTHING FOR STAGE USE ONLY	Yes ☐ No ☐
WARDROBE / CLEANING / ALTERATIONS	Yes ☐ No ☐
CONVENTION / CONFERENCE EXPENSES	Yes ☐ No ☐
DELIVERY / SHIPPING	Yes ☐ No ☐
EQUIPMENT RENTALS	Yes ☐ No ☐
HAIRSTYLING / COSMETICS (PERFORMERS ONLY)	Yes ☐ No ☐
INSURANCE OF BUSINESS EQUIPMENT / PROPERTY	Yes ☐ No ☐
INTEREST ON BUSINESS LOANS	Yes ☐ No ☐
INTERNET ACCESS / BUSINESS PORTION ONLY	Yes ☐ No ☐
MAINTENANCE AND REPAIRS	Yes ☐ No ☐
MANAGEMENT AND ADMINISTRATION FEES	Yes ☐ No ☐
MEALS AND ENTERTAINMENT - ENTER TOTAL AMOUNTS	
☐ for documented business meetings	Yes ☐ No ☐
☐ for business travel outside home city	Yes ☐ No ☐

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EXPENSES

MUSIC OR ART SUPPLIES (PROVIDE BREAKDOWN)	Yes ☐ No ☐
PROFESSIONAL DEVELOPMENT: CLASSES / TRAINING	Yes ☐ No ☐
OFFICE/STUDIO RENT (IF OUTSIDE YOUR HOME)	Yes ☐ No ☐
OFFICE SUPPLIES (POSTAGE, STATIONARY, PHOTOCOPYING, ETC.)	Yes ☐ No ☐
SUPPLIES AND MATERIALS	Yes ☐ No ☐
RESEARCH COSTS	Yes ☐ No ☐
SALARIES / WAGES / BENEFITS	Yes ☐ No ☐
SUBCONTRACT FEES (I.E. ACCOMPANIST, COPYIST)	Yes ☐ No ☐
SUBSCRIPTIONS TO INDUSTRY PERIODICALS	Yes ☐ No ☐
SUPPLIES AND MATERIALS (DIRECTLY RELATED TO YOUR WORK)	Yes ☐ No ☐
TELEPHONE - BUSINESS LINES ONLY (HOME PHONE COSTS NOT ALLOWED)	Yes ☐ No ☐
TRAVEL (TAXI / BUS / AIR / TRAIN / VEHICLE RENTAL	Yes ☐ No ☐
WEBSITE HOSTING AND DOMAIN NAME REGISTRATION	Yes ☐ No ☐
MEDICAL PREMIUMS FOR *PRIVATE* HEALTH PLANS	Yes ☐ No ☐

OTHER EXPENSES THAT DON'T SEEM TO FIT ELSEWHERE (PROVIDE BREAKDOWN)

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BUSINESS USE OF HOME

Total square footage of home

Square footage of areas used for business purposes or: Total rooms in home

Number of rooms used for business purposes

Did you use the business area of the home exclusively for business purposes?

If an area was used partly for business and partly for personal purposes - please indicate that area's square footage and the percentage of time it was used for personal purposes.

Write down the total amounts for the home:

Mortgage Interest
Rent Paid
Insurance
Property Taxes
Home Maintenance/Repairs
Heat
Hydro
Other Utilities
Security
Condominium Fees
Other Expenses

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AUTOMOBILE

Canada Revenue Agency indicates that a logbook is required to document business mileage. CRA may accept another reasonable method of documenting business mileage, such as a date book indicating engagements.

Total kilometers vehicle was driven .....

Kilometers driven for business .....

Did you acquire a new vehicle? ☐ Yes ☐ No

IF YES - please provide a copy of the bill of sale or the lease agreement.

Write down the total amounts for the vehicle, even if you did not personally pay all of the expenses.

Insurance	Maintenance/Repairs
License Fees	Gas And Oil
Loan Interest	Lease Charges
Parking	Car Washes
Auto Club Membership	

ASSET PURCHASES & DISPOSALS

Asset purchases and disposals include items such as stereo or audio equipment, CD recordings, music books, sheet music, office/studio furniture, musical instruments, and computer hardware or software. If you are a GST/HST Registrant please indicate GST/HST paid out separately.

If you bought or sold equipment, furnishings or other major assets please write down the cost or the sale price of each item:

PURCHASES	**Sales of Asset**
Studio/Office Furniture (provide breakdown)	Studio/Office Furniture
Computer Hardware	Computer Hardware
Computer Software	Computer Software
Other Assets	Other Assets

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ANYTHING ELSE?

Please list any other items related to your art business here: