



## INSTRUCTIONS FOR PERSONAL RETURNS WITH EMPLOYMENT EXPENSES

- ◆ Your tax preparer does not need to see all your receipts.
- ◆ There will be additional charges for the preparation of a statement from your source documents, if you prefer that we perform that work for you.
- ◆ Make sure your employment expenses statement resembles the attached sample, which indicates the expense categories allowed by Canada Revenue Agency.
- ◆ Complete the attached Auto & Workspace in the Home worksheets, if they apply to your situation.
- ◆ Bring in all personal (non-business income) tax slips and forms (T4's, RRSP receipts, etc.)

### IDENTIFICATION

Name: \_\_\_\_\_ Tax Year \_\_\_\_\_

Name of Employer: \_\_\_\_\_

Address of Employer: \_\_\_\_\_

Employer GST registration Number: \_\_\_\_\_

Have you brought in a completed [T2200](#)? (If not, *we cannot* process your Employment Expenses claim)

Employment Expense Worksheet Prepared By:  TaxTeam  Client

### EMPLOYMENT EXPENSES:

(\* = only Commission Based Employees can claim these amounts)

Accounting & Legal Fees *	_____
Advertising & Promotion *	_____
Entertainment * _____ x 50%	_____
Travel Expenses	_____
Meals (Actual) _____ x 50%	_____
Lodging	_____
Transportation (airline, bus, train)	_____
Parking Costs	_____
Office Supplies (postage, stationery, etc.)	_____
Other Expenses	_____
Long distance phone charges/Cellphone airtime	_____
Salaries of a substitute or an assistant	_____
Office Rent	_____
Licenses *	_____
Bonding Premiums *	_____
Equipment leasing *	_____
Training costs *	_____
Other Expenses _____	_____
<b>Expenses Total</b>	_____

- Check here if income is from commissions
- Check here if you are a tradesperson and purchased eligible tools in tax year
- Check here if you are an apprentice mechanic and purchased eligible tools in tax year



## AUTOMOBILE EXPENSE WORKSHEET

### Automobile Expenses:

	Vehicle #1	Vehicle #2
Make:	_____	_____
Model:	_____	_____
Year:	_____	_____
Date Acquired:	_____	_____
<b>TOTAL</b> kilometers driven in tax year (Required)	_____	_____
<b>EMPLOYMENT</b> kilometers driven in tax year (Required)	_____	_____
Fuel (gas, propane, oil)	\$ _____	\$ _____
Maintenance and Repairs	\$ _____	\$ _____
Insurance	\$ _____	\$ _____
Plates (license and registration)	\$ _____	\$ _____
Interest expense on money borrowed to purchase car	\$ _____	\$ _____
Lease payments, (if car is leased, see below)	\$ _____	\$ _____
Other _____	\$ _____	\$ _____
<b>TOTAL</b>	<b>\$ _____</b>	<b>\$ _____</b>

### Leased Vehicle

Lease start date	_____	_____
Lease end date	_____	_____
Total lease pmts deducted before the current year	\$ _____	\$ _____
Manufacturers list price	\$ _____	\$ _____

### Purchased Vehicle

#### Zero Emission?

Yes  No

Yes  No

Purchase date	_____	_____
Cost (before taxes)	\$ _____	\$ _____
Trade in allowance	\$ _____	\$ _____

### Calculation of Workspace in the Home Expenses:

Area of home used for employment purposes \_\_\_\_\_ Total Area of home \_\_\_\_\_

Space used exclusively for employment

Hours used for employment per day \_\_\_\_\_ Days work per week \_\_\_\_\_ Weeks work per year \_\_\_\_\_

Electricity \_\_\_\_\_

Heat \_\_\_\_\_

Water \_\_\_\_\_

Maintenance \_\_\_\_\_

Home Internet \_\_\_\_\_

Insurance (commission employees only) \_\_\_\_\_

Property Taxes (commission employees only) \_\_\_\_\_

Other Expenses: (Rent) \_\_\_\_\_

\_\_\_\_\_

**Total** \_\_\_\_\_