

Corporation Tax Preparation Checklist

To file your corporation income tax return, please use this checklist to provide the related information and documents. For more information contact us. Visit for our website resources.

www.calgarytaxfiling.ca

Corporation Information

*✔ Corporation year-end bank account balance

If this is the first year of corporation tax filing, please provide:

- *✔ Corporation name
- *✔ Corporation number
- *✔ Incorporation date
- *✔ Corporation address
- *✔ Corporation business number
- *✔ Corporation main product or service
- *✔ Shareholders' name and percentage of share
- *✔ Director or President's Name and Phone Number

If this corporation filed tax before, please provide:

- *✔ Previous corporation tax return



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Corporation Financial statement if any

- Profit&Lost statement
- Balance Sheet

If the company does not have the above financial statement, then please provide the following information:

Corporation Income

- Corporation Gross Income (net of GST)

Corporation Expenses (net of GST)

- Advertising and promotion
- Business insurance
- Business taxes, licences and memberships
- Computer-related expenses
- Credit card charges
- Donations
- Franchise fees
- General and administrative expenses
- Home office expenses
- Interest and bank charges
- Meal and entertainment
- Office expenses



- *✓ Professional fees
- *✓ Purchase of materials
- *✓ Rental
- *✓ Salaries and wages (attach T4)
- *✓ Shipping and warehouse expense
- *✓ Subcontracts
- *✓ Supplies
- *✓ Telephone
- *✓ Training
- *✓ Travel expenses
- *✓ Vehicle expenses (kilometres drove to earn business income)
- *✓ Other expenses

Dividend

- *✓ Shareholders' Dividend (attach T5)

Account R/P

- *✓ Account receivable
- *✓ Account payable

Cost of Corporation Capital Assets

- *✓ Equipment
- *✓ Others