



TRUCKTAX[®]

Managing the business side of trucking
for truckers and fleet owners.

START-UP BOOKKEEPING & TAX INFORMATION ORGANIZER

This Form For use by New Clients to Our Bookkeeping/Tax Services.

This business information Organizer Form is designed to help you pull together all of the information needed to allow Trucktax Accountants to setup your bookkeeping system, and Tax Management cycle and bring your bookkeeping and records up to date and prepare all applicable tax returns required, including, GST, Corporation and Personal Tax Returns.

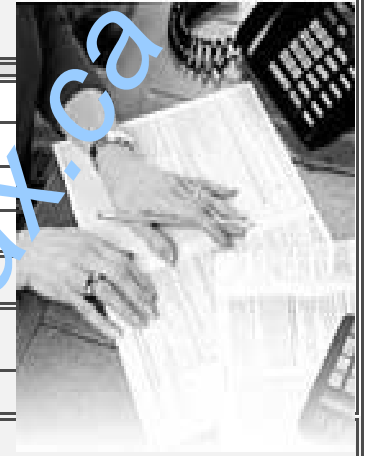
Once you have these information together, mail or deliver to us.

TRUCKTAX, INC

4261-A14 HWY 7 EAST, SUITE 885

MARKHAM, ONTARIO. L3R 9W6

PHONE: (905) 477-7773 - OR - TOLL FREE: (888) 456-6504



USE THE FOLLOWING BUSINESS EXPENSE LIST AS A REMINDER CHECK-LIST WHEN PULLING TOGETHER THE INFORMATION TO SEND US.

Accounting/Bookkeeping	Fuel Taxes	Subcontracts
Advertising	Health Insurance	Supplies
Bank Charges	HVUT Taxes	Support Vehicle
Broker Fees	Interest	Tire Repairs
Claims / Damages	Laundry & Uniforms	Tolls & Scales
Comdata/Comcheck	Legal Fees	Tools - Wrenches
Driver Payroll Tax	Licenses & Permits	Truck Insurance
Driver Service FEES	Lumpers-load/unload	Truck Maintenance
Driver Training	Medical DOT Comp	Truck Parts
Dues & Subscription	Motels	Truck Plates
Entertainment	Office Supplies	Truck Repairs
Equipment Rental	Parking Yard Rental	Truck Tires
Fuel & Oil	Postage	Truck Wash
Fuel Tax Report Fees	Professional Fees	Workman's Comp

Please include the Total operating Kilometer or Miles This Year or year-to-date

As you pull together all of the above applicable receipts and information, please organize them in the following format, and place these in an envelope and mail or deliver to us at the Trucktax address above

- 1. Truck Expense** - This includes Repairs Maintenance, parts and all applicable truck operating expenses. (Separate in Canadian/US)
- 2. Diesel Fuel** - Separated into country of purchase groups. Such as: - Fuel purchased in **Canada** and fuel purchased in the **U.S.**
- 3. Auto and/or Service vehicle Expense:** - This includes expenses for the operation of your personal/service vehicle used for the business
- 4. Home office Expenses:** - See the Tax organizer for examples.
- 5. Bank Statements**
- 6. Business and entertainment expenses:** Travel, Taxi, Hotel, Meals

PLEASE INCLUDE COPY OF THE FOLLOWING

- Copy of last Personal and/or Corporation Tax return filed and notice of assessment
- All Earning statements - T4s -AND- T-Slips FROM ALL sources
- Copy of all INCOME SOURCE STATEMENTS AND/OR INVOICE BILLINGS
- Copy of BANK STATEMENTS

4261-A14 Highway 7 East, Suite 885 . Markham, Ontario L3R 9W6. Ph: (905) 477-7773 --Toll-Free (888) 456-6504