



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 new client tax 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.



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 Tax return filed and notice of assessment

Copy of last Corporation Tax return filed and notice of assessment

All Earning and Information T-slips: - T-3, T-4, T-5, RRSP,

Please do not mail us the originals. Send us copies by fax or by mail. We prefer By Fax.

Sent by Tool-Free fax allows us to capture and store the Documents on our Image storage server

Copy of all official receipts for tax deductions. This includes:

Child Care, Union Dues, Moving Expense, Tuition fees (T2202), Charitable donations etc.

Copy of all INCOME SOURCE STATEMENTS AND/OR INVOICE BILLINGS

Copy of BANK STATEMENTS

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