

Employment Expense Checklist

To assist in the preparation of your Personal Income Tax Return, please complete this form and attach the supporting documentation. (Optional – total receipts by category and attach a calculator tape.)

In the event of an audit, the onus of proof is on the taxpayer; unsupported claims may be denied.

For information on Audits, refer to [Understanding Tax: Audits](#).

Name _____

Employment Information

- T2200 Declaration of Conditions of Employment** (required to deduct employment expenses)
- TL2E Claim for Meals and Lodging Expenses** (transport employees only)

Expenses

- | | |
|----------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| Non-commission employees | |
| <input type="checkbox"/> Food and beverages (travel and conference meals) | <input type="checkbox"/> Supplies |
| <input type="checkbox"/> Lodging | <input type="checkbox"/> Telecommunications (cell, fax, long-distance) |
| Commission Employees Only | |
| <input type="checkbox"/> Accounting and legal | <input type="checkbox"/> Leases (computer, cell, office equipment) |
| <input type="checkbox"/> Advertising, promotion, gifts | <input type="checkbox"/> Licence fees |
| <input type="checkbox"/> Food, beverages, entertainment | <input type="checkbox"/> Training |
| <input type="checkbox"/> Internet service | <input type="checkbox"/> Travel costs |

Auto Expenses

- An Auto Log is proof of your entitlement to a deduction for auto expenses.
For further information on Auto Logs, refer to Tax Tips: Auto Expenses at www.munrocga.com.
- Km driven for employment purposes** _____ **Total km driven** (Jan 1–Dec 31) _____
- Description of vehicle, Year, Make, Model** _____
- Was a new vehicle acquired or sold in the year?** Y N (If YES, please provide documents)
- Was an allowance received?** Y N (If YES, provide details) \$ _____
- | | |
|--------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| <input type="checkbox"/> Fuel | <input type="checkbox"/> Maintenance and repairs (including Air Care) |
| <input type="checkbox"/> Insurance (include copies of policies, Jan 1–Dec 31) | <input type="checkbox"/> Interest (include loan documents) |
| <input type="checkbox"/> Lease costs (include documents) | <input type="checkbox"/> Parking (estimate meter parking) |

Work-Space-In-Home

- Square feet used for workspace** _____ **Total square feet of home** _____
- Non-commission employees**
- | | |
|--------------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Hydro, heat, and water | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Maintenance | <input type="checkbox"/> Strata fees \$ _____ |
| Commission employees only | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Insurance | <input type="checkbox"/> Property taxes _____ |

Keeping Records

Generally you must keep your records for six years from the end of the taxation year to which they relate.
For more information about keeping records, see [Understanding Tax: Record Retention](#).

At **Munro & Company**, we prepare tax returns for individuals, businesses and corporations with basic and advanced tax requirements. Whether you are an employee, business owner, investor, or retiree, we can help you keep more of your hard earned income.