



## Transport Driver (Owner Operator) Tax Checklist

In order to better serve you, Cross Corp has created a customized checklist for you - if you are a transport driver who owns their own truck (aka an Owner Operator). This helps to ensure a confident and efficient filing process. By using this checklist to prepare for our meeting, we can ensure that we get the most out of our time together.

*Please note that this list is tailored for Owner Operators. We encourage you to make use of our free Business Buddy Chatbot on our website to get a headstart. You can ask Business Buddy questions or details about specific forms or expenses to help determine eligibility.*

### General Information:

- Copy of Your Previous Tax Return (if new client)
- Your Full Name
- Contact Information (Address, Phone Number, Email)
- GST/HST Number (if applicable)

### Business Information:

- Business Name (if applicable)
- Business Number
- Year-End Summary or Income Statement

### Gross Income from Transport Business:

- Total Earnings as an Owner-Operator

### Expenses (net of GST/HST):

- Fuel and Oil Expenses
- Vehicle Maintenance and Repairs
- Truck Insurance
- License and Registration Fees
- Mobile Phone Expenses (used for business)
- Toll Charges
- Cleaning and Wash Expenses

- Leasing or Financing Costs (if applicable)
- Parking Fees
- Meals and Per Diem Expenses
- Lodging Expenses
- Uniform and Safety Gear Expenses
- Business Use of Technology (e.g., GPS, communication devices)
- Other Business-Related Expenses

#### Business-Use-of-Home Expenses:

- If applicable, expenses related to a home office (percentage of home used for business)

#### Vehicle Information:

- Make and Model of Truck(s)
- Truck Ownership Details (Owned, Leased, Financed)
- Total Kilometers Driven for Business
- Total Kilometers Driven Overall

#### Documentation for Vehicle Expenses:

- Fuel Receipts
- Maintenance and Repair Invoices
- Insurance Statements
- Mobile Phone Bills
- Toll Charge Receipts
- Cleaning and Wash Receipts
- Leasing or Financing Agreements
- Parking Fee Receipts
- Meal Receipts (if deductible)
- Lodging Receipts (if deductible)
- Uniform and Safety Gear Purchase Receipts
- Technology Expense Receipts

#### Tax Credits and Deductions:

- Keep records of any additional tax credits or deductions you may be eligible for.

Remember, thorough documentation of your expenses is essential to maximize your eligible deductions and credits. If you have questions or need assistance, our Business Buddy Chatbot is available on our website to guide you through specific expense

categories and help ensure you've covered all eligible items. We look forward to assisting you in optimizing your Owner Operator tax return.