

Simply Smart Bookkeeping Toolkit

CRA-Ready Checklist & Mini Guide for Small Businesses

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Organize All Receipts and Invoices

Sort receipts monthly in folders or digital apps. CRA requires you to keep them for at least 6 years.
Pro Tip: Take photos of receipts as soon as you get them.

Reconcile Bank Statements

Match your bank transactions with your bookkeeping records every month.
Pro Tip: This catches errors early and ensures accuracy.

Update Accounts Payable & Receivable

Track outstanding bills and invoices.

Pro Tip: Use automated reminders for late payments.

Prepare Payroll Records

Ensure T4s, pay stubs, and payroll remittances are complete.

Pro Tip: Payroll software helps avoid CRA penalties.

Review GST/HST Returns

Ensure amounts match filed returns.
Pro Tip: Keep collected tax in a separate account.

Compile Year-End Financial Statements

Prepare P&L, balance sheet, and cash flow.
Pro Tip: Review these with your bookkeeper.

Check CRA Deadlines

Track important filing and payment dates.
Pro Tip: Add reminders to your calendar.

Back Up All Financial Data

Keep two backups — one cloud, one physical.
Pro Tip: Automate backups to avoid loss.

Bonus Resources

- CRA Business Number Registration Guide: canada.ca/en/revenue-agency.html
- Free Invoice Template: email sssbookkeeping@outlook.com
- CRA Business Enquiries: 1-800-959-5525
- QuickBooks & Wave setup tutorials (YouTube)

Contact & Next Steps

Thank you for downloading the Simply Smart Bookkeeping Toolkit!

If you want bookkeeping and tax season to be stress-free, let's talk.

- Email: sssbookkeeping@outlook.com
- Phone: (403) 973-3854
- Calgary-based | Serving clients across Canada

Book your free consultation today and see how easy managing your books can be.
