

COURT FILE NUMBER \_\_\_\_\_

Clerk's Stamp

COURT COURT OF KING'S BENCH OF ALBERTA

JUDICIAL CENTRE \_\_\_\_\_

APPLICANT(S) \_\_\_\_\_

RESPONDENT(S) \_\_\_\_\_

DOCUMENT Business Expense Disclosure Statement

ADDRESS FOR SERVICE AND CONTACT INFORMATION OF PARTY FILING THIS DOCUMENT \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*This is a print-only version of the Business Expense Disclosure Statement, intended for use by persons who do not have access to the Microsoft Word application. If you have access to Microsoft Word, use of the equivalent Word-format version of this form, available through the Court of King's Bench Website, is strongly encouraged.*

Business Name: \_\_\_\_\_

Corporate Year Ending: \_\_\_\_\_

Prepared By: \_\_\_\_\_

I, \_\_\_\_\_, of \_\_\_\_\_, Alberta,  
(Name) (Town or City)

am self-employed or have an interest of 1% or more of a privately held corporation and am required to provide business expense disclosure in accordance with Alberta law (*Cunningham v Seveny*, 2017 ABCA 4 and *Sweezey v Sweezey*, 2016 ABQB 131).

Except as expressly listed below, none of the expenses deducted on Schedule T2125 (self employed persons) or on the financial statements of the corporation have a personal benefit component or were payments or benefits paid to or on behalf of persons or corporations with whom I do not deal with at arm's length.

I swear/affirm that the following information is true:



**List of Expenses**

**1. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

---

**2. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

---

**3. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**4. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**5. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**6. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**7. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**8. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**9. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_

\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_

\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**10. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_

\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_

\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**11. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**12. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**13. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**14. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

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**15. Nature of Expense:** \_\_\_\_\_

**Source of Expense Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Reason for Expenditure:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Value of Personal Benefit:** \$ \_\_\_\_\_

**Benefit Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Source of Benefit Calculation:** \_\_\_\_\_  
\_\_\_\_\_

**Recipient(s):** \_\_\_\_\_

## List of Non-Arm's Length Persons or Corporations

---

1. **Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

---

2. **Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

---

**3. Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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**4. Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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**5. Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

---

**6. Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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7. **Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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8. **Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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**9. Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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**10. Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Job Responsibilities:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Compensation Value:** \$ \_\_\_\_\_

**Compensation Details:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

SWORN / AFFIRMED BEFORE ME on \_\_\_\_\_, \_\_\_\_\_ at \_\_\_\_\_, Alberta.  
(Day) (Year) (Town or City)

\_\_\_\_\_  
Commissioner for Oaths in and for Alberta

\_\_\_\_\_  
Signature