

2011 Personal Income Tax Return Information Gathering Checklist
Returning Clients

NAME: _____

DATE: _____

- | | <u>YES</u> | <u>NO</u> |
|--|--------------------------|--------------------------|
| 1. Has there been any change in address or phone number during 2011?
If yes, please indicate below: | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Has there been a change in dependents during 2011?
If yes, please describe: _____
_____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Did your marital status change during 2011?
If yes, please describe: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Did you dispose of any property during 2011 (include real estate, stocks,
bonds, etc.)?
If yes, please describe, including cost and proceeds: _____

_____ | <input type="checkbox"/> | <input type="checkbox"/> |

In addition, please provide us with the following items, if applicable:

- | | Attached | N/A |
|--|--------------------------|--------------------------|
| 1. Copies of last years Notice of Assessment, if not already provided. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Income tax instalment receipts or amounts paid for 2011. | <input type="checkbox"/> | <input type="checkbox"/> |

Please fill in and sign an Engagement letter.

**** PLEASE LIST YOUR CURRENT CONTACT INFORMATION AND INDICATE THE BEST WAY IN WHICH TO CONTACT YOU.**

Address: _____

Phone: _____

Cell: _____

Email: _____