CHARTERED ACCOUNTANTS
JOHNSEN ARCHER LLP

2011 PERSONAL INCOME TAX RETURN CHECKLIST

Name: ______________________ Spouse: ______________________

Date of Birth: ______________________ Date of Birth: ______________________

Instalments paid for the year $ ______________ Instalments paid for the year $ ______________

Mailing address: ______________________ Company name: ______________________

______________________ Phone (home) ______________________

______________________ Phone (Business) ______________________

______________________ Fax ______________________

E-mail ______________________ E-mail ______________________

WE INTEND TO ELECTRONICALLY FILE ("E-FILE") YOUR RETURN.
If you do not wish to have your return E-filed, please indicate here: ☐

Did you hold foreign property at any time in 2011 with a total cost of more than CAN$100,000? Yes ☐ No ☐

Are you a **US citizen** or **green-card holder**, or do you **regularly conduct business in the US**? Yes ☐ No ☐

Do you authorize CRA to provide your name, address and date of birth to **Elections Canada** to update your information on the National Register? Yes ☐ No ☐

Tax slips for the following income:

Employment income (T4) ☐
Pension (T4A, T4 OAS, T4AP) ☐
Statement of Partnership income (T5013) ☐
Employment insurance benefits (T4E) ☐
Dividends/Interest/Capital Gains (T5) ☐
Investments (T5013/T5008) ☐
RRSP, DPSP, RRP, RRIF (T4RSP/T4RIF) ☐
Estates/Trusts/Mutual Funds (T3) ☐
Universal Child Care Benefit (RC 62) ☐
RRSP contribution slips ☐
Tuition fees (T2202, signed by student) ☐
Statement of resource expenses (T101) ☐
Other ______________________ ☐

Documents for the following transactions: ☐
Last year's Notice of Assessment ☐
Investment summary statement ☐

Other information:
Marital status as at December 31:
Single ☐ Separated/Divorced ☐
Married ☐ Common-law ☐

Spouse's income $_________
(if spouse is not to be prepared by Johnsen Archer)

Summary of other items:
(Provide receipts only if you are unsure of the tax treatment)

Charitable donations $_________
Political donations $_________
Monthly bus passes $_________
Union/Professional dues $_________
Child care expenses $_________
Child recreation/fitness expenses $_________
Child artistic/cultural expenses $_________
Interest paid to earn investment income $_________
Investment counselor fees $_________
Safety deposit box rent $_________
Student Loan interest paid $_________
Medical expenses $_________
Alimony/maintenance paid $_________
Alimony/maintenance received $_________
Other ______________________ $_________

Schedules to be attached:
Employment expenses ☐
Rental income and expenses ☐
Self employment income/expenses ☐

Dependants not listed on your prior years' return:
Name ______________________
Birthdate ______________________
Relationship ______________________
e-mail ______________________

Comments (continue on back or attach a separate sheet if required):