

# FRIENDLY REMINDERS PRIOR TO FORWARDING YOUR INFORMATION TO **LOGAN KATZ LLP**

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- ☞ **Have I completed the Logan Katz LLP Checklist and considered Schedules A - G?** YES   
(while these Schedules may appear somewhat overwhelming and time-consuming, they will minimize the follow up required by my Logan Katz LLP preparer and, therefore, will expedite the completion of my return, as well as keep my fees to a minimum!)
- ☞ **Have I signed the engagement letter and enclosed it with my information?** YES
- ☞ **Have I made arrangements for the delivery of my return (e.g. courier and address; pick up; etc.)?** YES
- ☞ **Have I made payment arrangements with Logan Katz LLP (e.g. Visa or Mastercard number)?** YES
- ☞ **Have I made my Logan Katz LLP preparer aware of any exceptional situation applicable in 2011?** YES
- ☞ **Have I enclosed my 2010 Notice of Assessment with my information?** YES   
(If Logan Katz LLP does not have my Notice of Assessment, I am exposing myself to errors in filing my 2011 return.)
- ☞ **Have I set up "My Account" and authorized Logan Katz LLP as a representative?** YES
- ☞ **If I am a new Logan Katz LLP client, have I enclosed copies of my 1994, 2009 and 2010 income tax returns along with the related Notices of Assessment and Reassessment?** N/A  YES
- (i) **If I wish to have my income tax refund deposited directly in my bank account, have I informed Logan Katz LLP? Does Logan Katz LLP have my current banking information?** N/A  YES
- (ii) **If I have amended my banking arrangements, have I informed Logan Katz LLP?** N/A  YES
- ☞ **Have I made Logan Katz LLP aware of my foreign assets with an aggregate cost in excess of CAD \$100,000?** N/A  YES
- ☞ **Have I returned my USB memory stick that came with my 2010 final package for Logan Katz LLP to add my 2011 return once completed?** N/A  YES

## Logan Katz Tax Season Business Hours

Monday to Friday 8:30 a.m. to 5:00 p.m.  
(including Good Friday – April 6<sup>th</sup> and Easter Monday – April 9<sup>th</sup>)

Also note that some Logan Katz staff may be working later hours during the month of April.  
Kindly make arrangements **prior** to coming to the Logan Katz offices after hours or during the weekend.

*(Please ring the doorbell located at our front door if you are visiting our offices outside of our regular business hours)*