



client profile

First name: _____ Last name: _____

Date of Birth: _____ SIN: _____

Full mailing address: _____

Mobile #: _____ email (required): _____

Please answer the following questions: Y N

Do you agree to release your name, address and date of birth to Elections Canada?

Did you own or hold foreign property at any time during the year with a total cost of more than \$100,000 Canadian? If yes, please provide full details.

Did you sell open a First Home Savings Account (FHSA) during the year?

If so, how much did you contribute within the tax year? \$ _____

Did you sell your principal residence during the year?

Did your marital status change during the tax year?

Did you have any new dependents join your family during the year?

If so, please provide;

Full name: _____ Date of Birth: _____

Would you like the CRA to e-mail you rather than send letter mail?

Are you currently signed up for direct deposit with the CRA? If not, but would like to be, please provide void cheque or corresponding information.