



new 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 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.

PRIVACY: The information requested to be provided is required by MBS Plus to assist in the preparation of personal income tax returns. Use and custody of this information will be in accordance with the firm's Privacy Policy Statement, a copy of which may be reviewed at our office or obtained upon request. Your provision of personal information to MBS Plus implies your consent to its use as per the privacy and terms of engagement.